TK8 Contact User's Manual

Thank you very much for selecting TK8 Contact!

TK8 Contact is a professional contact management software. In addition to contact info management, it can help you in all stages of customer relationship management. You can track and analyze sales, campaigns, opportunities, customer activities, send personal e-mails and letters to different contact groups, maintain subscription lists, etc. Activities have also daily, weekly and monthly calendar views so you can easily plan appointments or view other activities like phone calls in the timeline form.
Easy-to-use interface is fast and helps you to find required information quickly. Just select the customer and you already see all the history with that customer.

Most about TK8 Contact is described in this manual. Just locate to the topic you are interested in.

If you have any questions, suggestions or comments, please contacts us.

Special thanks to:

TK8 Contact Beta Test team, which spent many months testing this new version.

Our loyal customers who have been funding TK8 Contact development for over 7 years

Last not least, we want to thank EC Software who wrote this great help tool called HELP & MANUAL which printed this document.

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1 Welcome

Thank you very much for selecting TK8 Contact!

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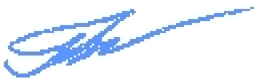
By using TK8 Contact you know everything about your customers and their expectations. You will never lose any customer data and making business decisions is easier.

We guarantee you that this simple program will save your time, increases your customer satisfaction and helps you to generate additional profits.

Most about TK8 Contact can be found in this help file. Just locate to the topic you are interested in.

If you have any questions, suggestions or comments, please contacts us.

Best wishes,



Tonis Kask,
TK8 Software team,
B & M Konsultatsioonid Inc.

2 Quick Start tutorial

2.1 Installation

Once you have downloaded the installation file, you can launch it with the double-click on it's icon.

The Setup window appears with descriptions how to install the program. By clicking "Next" and "Back" buttons you can navigate between the steps. If you do not want to change default settings, the only thing you have to do is to click on the "Next" button in each step.

After all Setup steps are completed, you can click the "Finish" button to close the Setup program. Now you are ready to run TK8 Contact.

2.2 Starting the program

After the program is installed, you can start TK8 Contact in several ways:

1) Click on the Start menu button, select Programs, TK8 Contact folder, and click on the TK8 Contact icon.

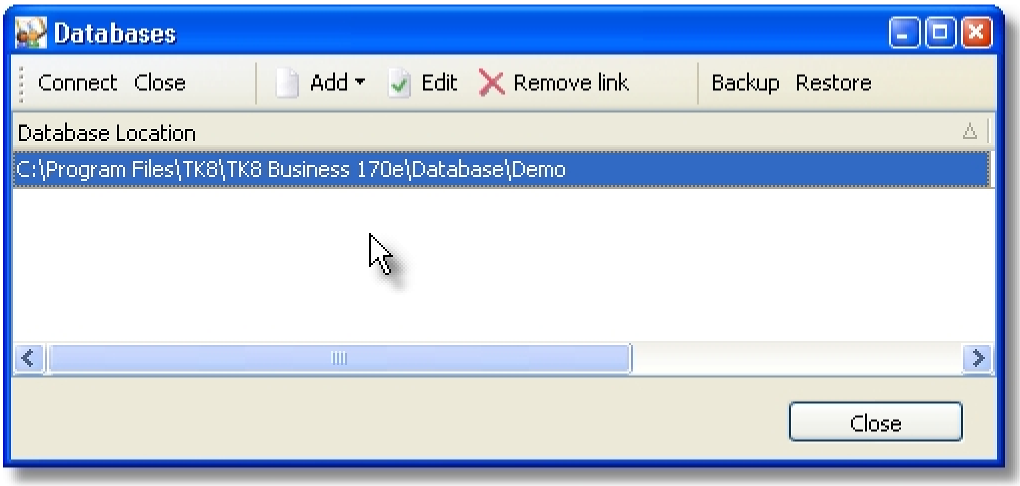
2) If the TK8 Contact icon is on the desktop, you can run the shortcut with double-clicking on it.

2.3 Setting up the system

2.3.1 Creating a new database

After installed and first time started, the program is opened with demo database. Demo data is good to get the overview of program functionality and possibilities. If you want to create a blank new database for your data, open File menu and select "Manage Databases".

On the appearing window you will see the list of current databases you can open:

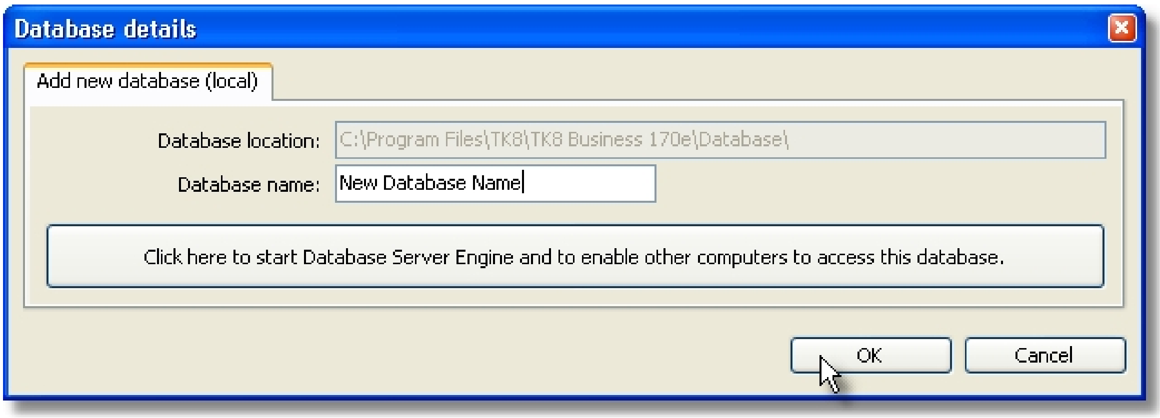


To create a new database, click on the Add button on the toolbar and select "New database (local)" from the appearing menu:

After selected, New database details window appears where you can enter the name for your

database.

Database name is a technical name and it does not have to be exactly the same as your company name. You can set up company name on the options later. Database name is used to create a folder where to keep data (related to that database).



After you have entered the Database name, you can click OK and the new database is created.

You can also create a connection to the database already exists on your computer. For example if you have re-installed the computer, and restored Databases folder of TK8 Contact. In that case, after you have clicked the "Add" button, just select "Link to existing database (local). And on the appearing window you can just select the database you cant to add to the list.

After you have closed the database detail dialog, you are back on the database list management window.

On the database management window, you can also edit the selected database info and remove it from the list. By removing database link from the list, the database is not deleted from your system. You can not delete database from inside the program. To do this, you have to do manually delete the folder from TK8 Contact folder, from Databases subfolder.

2.3.2 Opening databases

To open some other database, please click on the File menu, "Manage Databases". On the appearing window you will see the list of available databases. To open some of them, just select it in the list and click on the "Connect" button.

2.3.3 Multiuser system setup

2.3.3.1 Setting up multi-user environment

You can set up TK8 Contact in the way multiple users from the same network can access the database at the same time. As TK8 Contact is client-server system, setting it up can take a bit time. Below you will find instructions how to set up the system for multiple users.

At first make sure the program is installed to all computers where the user needs to access the database.

Next you have to select one computer which would be the server. Server computer holds and serves the data for other users. The more powerful your server is, the better is the speed for other users. Also, you have to make sure server is always working on the time other might want to access the database. If you shut down the server, other users can not access the database.

Once the server is selected, start TK8 Contact on that computer. Open File menu, Program Options. On the general panel check the option to "Start Database Server Engine on the program startup". Save the options, and re-start the program.

If you are using Windows XP (at least SP2), you are prompted to allow access to the database engine through the firewall. If you are using other firewall products, please enable ports 12005 and 12006.

Once the program is started and Database engine is running, you are ready to create a new (local!) database or open previously created database to work with. After the database is added to the list, please click Edit button on the toolbar, after which the database details will appear. Click on the button "Click here to start Database ...". After that, you can close database details and management window. You can connect to the database and after that it is also available for others to access.

To set up client computers to access the database you set up on server, start the program on some of these client computers. Open database management window, and add new database ("Link to existing database (LAN)"). On the database details window, to the Host name field enter the computer name of the server computer (used on your network). Then click on the button "Before selecting database below ...". The click will establish connection with the server and so you are able to select the database by using "Select database" combo box. After the correct database is selected, you can save the database details and connect yourself to the database on server computer.

To set up additional client computers to access database on the server, just repeat the step above on that other client computer.

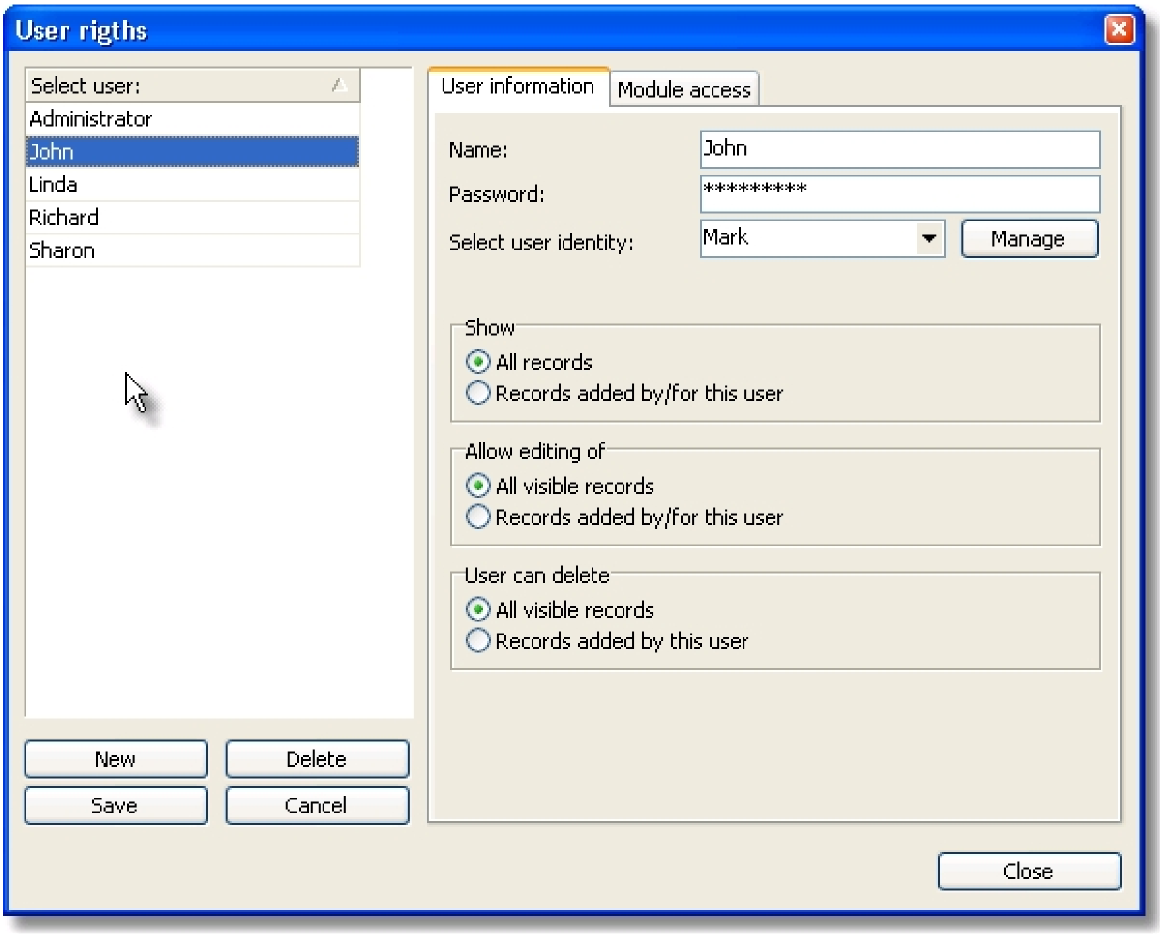
2.3.3.2 Users system

In the program, you can create accounts for every user accessing your database. Once accounts have set up, only authorized users can log in to the database. For this they have to know the password which they have chosen or which is set to them. The password is asked every time the program is started or the database changed (if the database has user accounts and passwords).

Also, it is possible to specify what modules, data and functions users are allowed to access.

To manage database user rights, open File menu and select "Users & passwords":

From the appearing window, click on the "Manage users" button if you want to add or edit some user account settings. Please note that selected user has to have a right to manage user accounts. Also, if the selected user name has password, the password is required to edit any user accounts.



As seen on the image above, at left there is a list with all user accounts. By selecting some account in the list, on the right panel you will see the settings for that account. Each account has a name (for login purposes), password, and the user identity. As many data entry forms have fields like "created by" or "edited by", these fields are automatically filled with this user identity. So you can select the name that identifies this user account. Often this is the same as the account name. With new database the user identity selection list is empty and you have to add identities at first. For this you can click "Manage" button. To read more about how to manage identities and other base information, read the next chapter "Entering base information".

In the user rights window you can also specify if the user should see, edit and delete all entries, or only those related himself.

Also, it is possible to set rights based on the modules. For this, click on the "Module access" panel name and select which modules you would like to enable for selected user account.

To add new user account, just click on the "New" button and start filling the fields.

To delete some user account, select it from the list and click on the "Delete" button.

Once you have finished with user mangement, you can save changes by clicking on the "Save" button. After you are finished you can just close the window.

Please note, that you can not disable user mangement rights for "Administrator" account. Also it is not possible to change it's name. If you are using passwords, please do not forget them, specially

the Administrator password. If you lose it, there is no way to even access your database.

After user rigts are set, you can log in using the user name and password. Each time the program is started and you have users set up, it is required to select the user and enter password. Without this it is not possible to open the database.

Once the user has finished the work with database, it is possible to log off or by closing the program the user is also logged ff automatically.

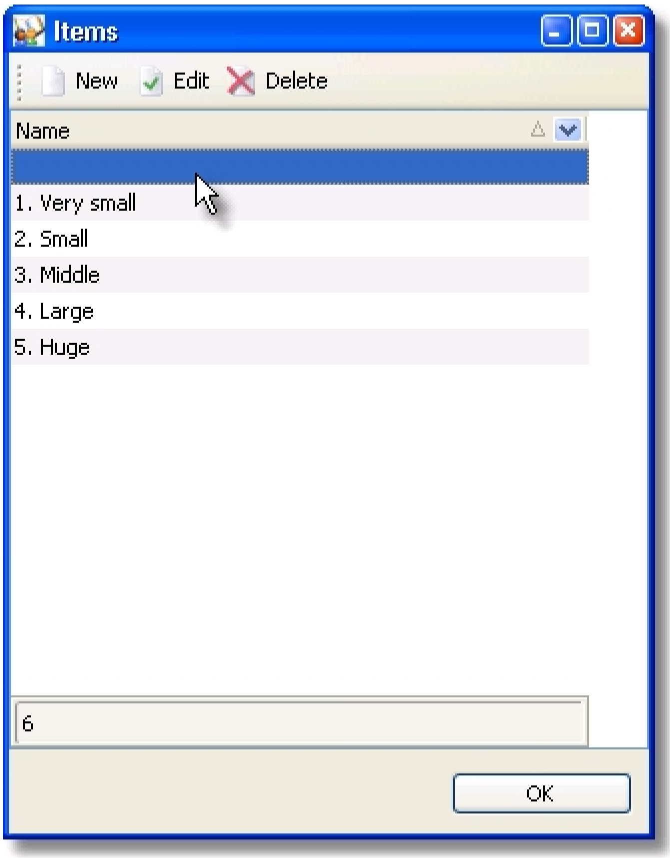
2.3.4 Entering base information

Inside the program (on the data entry forms) there are lots of fields where you can select values instead of typing them manually every time. For this you can use selection boxes. Some of these selection boxes are editable, which means you can set yourself which values you prefer to select to that field.

For example you can have service level selections with values "A customer; B customer; C customer", or "1 - Hight; 2 - Normal; 3 - Low". In the empty database, there are no selections available for fields, so you can set your own values you would like to start using on that field.

Selecting a value to the field is easy. Just click on the triangular button at the right of the field and you can select the value you need. To edit the list of available values for that field, you will see three "dots" at the right of the field:

If you click on the button with these three dots, selection item editor appears:



In this window you can add, edit and remove items. For every field, as told, you can have different selections.

Once you have completed the information management, you can close the window by clicking on the OK button.

Suggestions:

1) When creating a value list, you can number the values like seen on the image above. This way you can set your own order for the selections. For example that "Very small" is always the first selection and "Huge" is the last selection. Without numbers, the list is sorted alphabetically.

2) You might want or need to add empty value (line) to the list. There are fields which can not be left blank once they are already filled. But if you still need to remove the selection, you can just select the empty value to the field. This is also much easier and quicker solution to clear the field, compared to manual deletion with the keyboard.

2.4 User interface

2.4.1 Modules

TK8 Contact has different modules to handle different kind of information better. Module selection menu is seen on the Main window, soon the program is started.

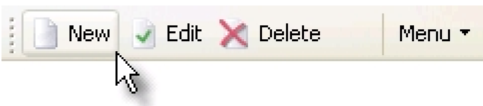
When you click on the Module name, a menu selection appears where you can select whether you want to open the list of module entries, add, edit or delete some entry.

Some modules in the program have also submodules. For example "Sales" module has tables to record Sales, Purchases, Invoices, Bills and Inventory items.

Each module has different data forms with different fields to store your information. You can read more about each module and for what it is intended for in the "Program Modules" chapter.

2.4.2 Toolbar

Each module has own toolbar at top of the entry list:



First three buttons can be used to manage your records. When you click on the "New" button, detail form appears where you can start filling fields for new data entry. Once completed, the new record is added to your database. "Edit" button brings up the details from with fields filled with selected entry info. By using "Delete" button you can delete selected record from the database (confirmation is required to delete entry).

When you click on the "Menu" button, you will see additional commands:

Different modules can have a different list of additional commands. For example Menu button in Activities module has Archive management commands. All these additional commands are described in the chapters below.

Some modules can have also additional selections on the toolbar. For example Statistics has field selections and Activities module has possibility to select between different display types:

2.4.3 Searching & sorting information

Quick search

To find some record quickly, you can just start typing on your keyboard and the closest record will be located immediately. The locate is made by the column the cell is currently selected. Just click on any value on the column, start typing and the closest value will be located.

Quick search feature is working in all tables, so finding your information is always quick and easy.

Sorting tables

Information in any table in the program can be in the order you like it to be. To sort the table by some column, just click on the column header:

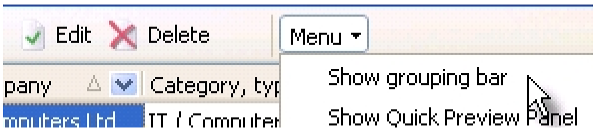
A rectangle appears after the click showing the sort order. The second click on the already sorted column header will reverse the sorting order. So it is possible to sort entries ascending or descending, depending how you would like to see the list.

It is also possible to sort the entry list by more than one column. To add sorting to additional columns, hold down the SHIFT key on the keyboard when clicking on the additional column header.

Sorting order is remembered for every table. So when you close the program and return next time, information is in the order you preferred.

2.4.4 Data grouping

Information in your tables can be grouped easily. To be able to group records, grouping bar should be visible. When you open the toolbar Menu, then first selection "Show grouping bar" should be checked.



If the menu item is not checked, click on it and the gray grouping bar appears. Grouping bar can be found from between the toolbar and the table header (column names).

To group your table, drag some column header to the grouping bar with your mouse and you will see the records grouped:

You can extract and collapse groups by using the "+" and "-" buttons.

You can group your tables by more than one column. For this, just drag additional column to the grouping bar.

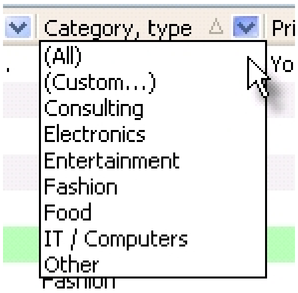
Similar to sorting memory, also grouping settings will be saved and next time you return to the program, your grouping settings are restored automatically.

To remove column grouping, just drag the column back to the table header. To hide the grouping bar, use the Menu button.

2.4.5 Using Filters

Filters can be useful in situations where you have a lot of records in the table and you need to see only those meeting some criteria. For example if you want to see only customers with the same service level or activities created for you, etc. With filters other records are invisible until the filter is unset.

To set a filter to the entry list, you can use filter combo box at right on the each column header. After clicked, you can select the value you want all the records should have in that column:

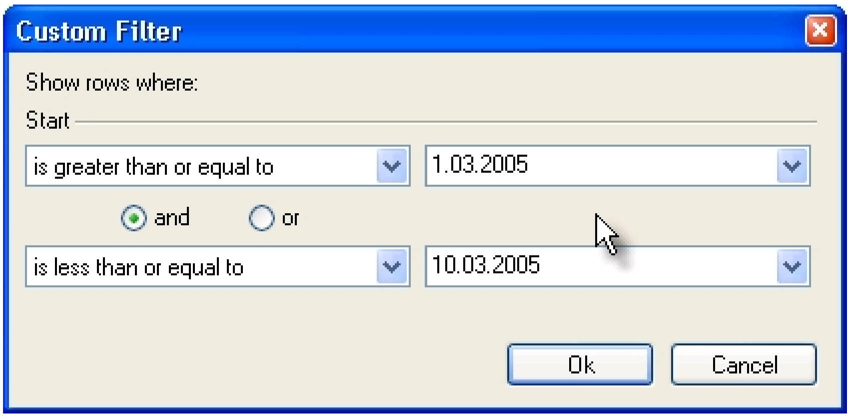


If you already have a filter on that filed, you can select "All" to remove a filter from this field and see all values again. Your table can have multiple filters also. For this, open the filter menu of some other field and select the value you need.

You can also create flexible custom filters by selecting "(Custom...)" from the appearing filter menu. For example you can create filters to see entries beginning with letter "a" only. The custom filter dialog is easy and intuitive with descriptions. In general, you just have to select the condition (equal, greater than, like, etc..) and type the value.

Some examples:

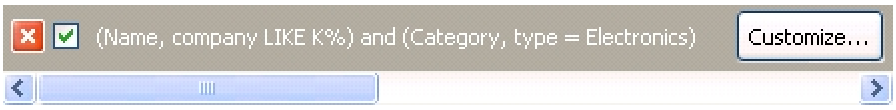
1) If you need to see only records created between 1'th March 2005 and 10'th March 2005 (these dates included), you can open the Custom filter dialog for this date field and fill the fields like below:



2) If you want to see companies with names beginning with letter K, you have to set custom filter to Company name field. In the first (left above) combo box select "like". To the edit box at right

enter "K%" and close the dialog. After that, you should see only companies starting with K in your list.

Once the filter is set to the table, you can see the current table conditions (filters set) at the table footer:



Similar to sorting and grouping, filters are remembered when you close the program. So next time you return, they are still set.

If you are using different filters often, you might want to save them to file. So you do not have to compose them manually each time and can load from file quickly. To save a filter, click on the "Customize..." button. After clicked, a window appears where you can change the current filter if you want and then save it to the file by using the "Save As" button.

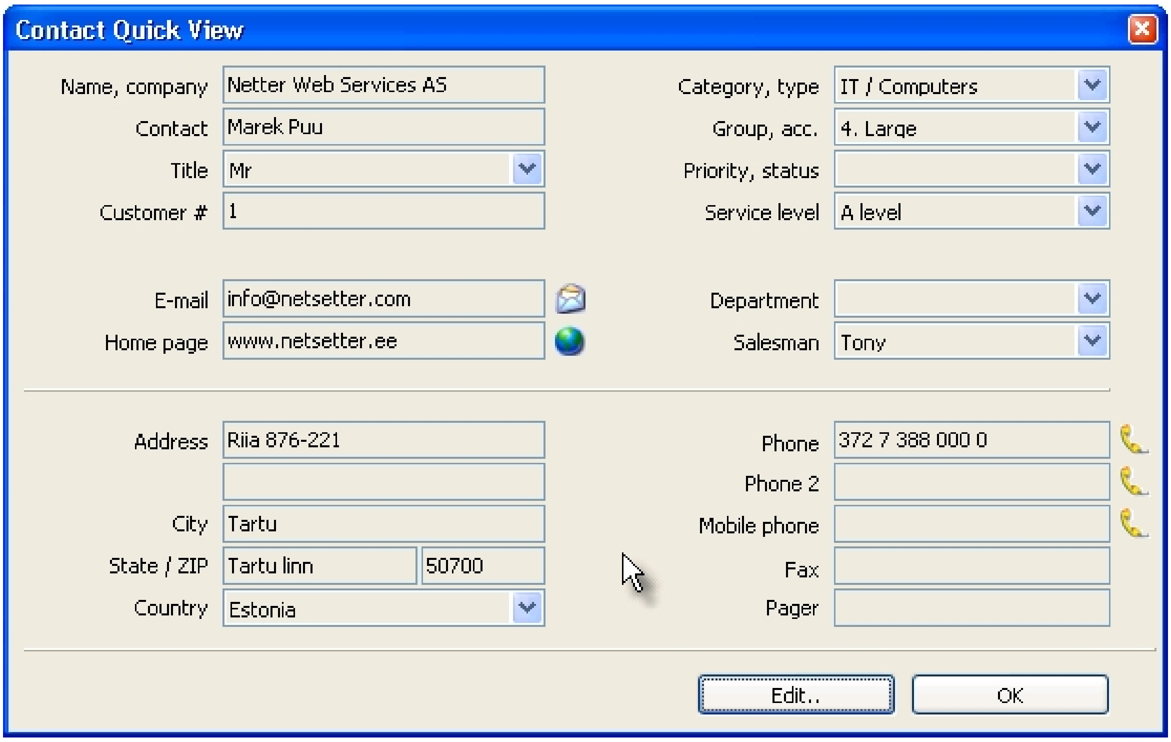
To open saved filter, set any custom filter to some column at first, so you could see and access the filter conditions panel. Once the filter is set and you see the filter conditions panel, you can click on the "Customize.." button, which will open the filter customization window. There, you can use the "Open" button and select the filter condition file you saved.

To remove (close) the filter from the table, click on the red "X" button at left on the filter condition panel.

2.4.6 Contact quick info panel

In any module where there is a contact field available on the data entry form, you can open quick info panel for the contact related to the record currently selected. This way you can access quickly contact details when you are using Activities or sales module for example.

To get contact detailed information, right click with your mouse on the table and select "Show Contact Quick Info". Or, you can use the Menu button on the toolbar for the same selection. After this contact quick info panel appears:



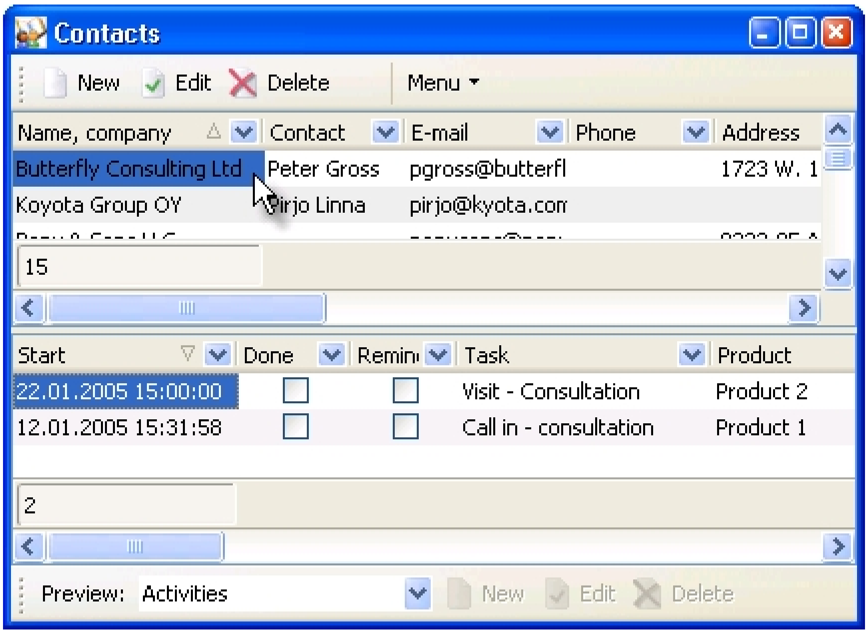
You can use buttons at right of fields to quickly start new e-mail or automatically start dialing phone number. If you need to change any data, you can click on the "Edit..." button and the contact detail form appears where you can do your changes.

To close this quick info panel, just click anywhere on the gray area or fields on the form, or on the "OK" button.

2.4.7 Quick preview panels

Quick preview functionality can be very useful in many modules. It can show you related information for the contact of selected record. For example in using the Contact module you can see all the activities or sales or other information for the selected contact. In the activities module you can see all the sales or other information related to the contact selected to the current activity.

To activate quick preview, click on the Menu button on the module top toolbar and select "Show Quick Preview Panel". After this additional table is added to your module, to below of the main table:



In addition to the preview table, also additional bottom toolbar is added to the module. In that toolbar you can select the information you would like to see on the preview table. To change that, click on the combo box button and select other module data to display:

Using the quick preview table is similar to main tables. You can sort and search the information, and use filters. In the near future you would be able also to add and edit related records.

To hide the preview panel, you can use the Menu button again to deactivate it. Also, you can select "-- none --" in the module selection combo box and the quick preview panel disappears.

2.4.8 Customizing columns

Changing column position and size

Each table in the program has default widths and positions for every column. But this can be changed. To change the size of a column, move the mouse cursor to the end of the column header name, until a cursor takes a sizing shape:

Then click the left mouse button, hold it down and move the mouse to left or to right until you get the column width you want. Then release a mouse button.

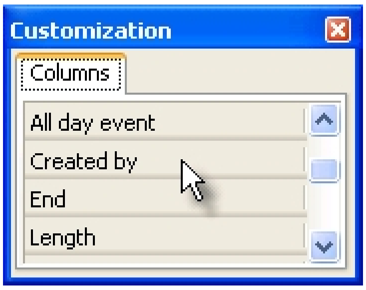
To change a position of some of your columns, left click on the column header and hold the button down. Then move the column to the position you want and release the mouse button.

The column setup for each table is remembered like other table settings.

Adding / removing columns

By default not all fields are visible in the table, as each module has a lot of fields. If some of the fields you would like to see in the table is missing, you can add it. Also, if you want to remove some column, you can do this also.

To start column customization, right click with your mouse on the some column header. After the click a menu selection should appear where one of the choices is "Field Chooser...". Click on this selection and additional window will be opened to your screen, where you will see all the fields available for the current table, but which are not presented on the table currently:



To add some field from that list to your table, just left click with your mouse on the field, hold down the button and drag the field to the table. Once the field is on the table header, release the mouse button. After that the field should be seen on the table.

To hide some column, use the same customization form. For hiding just drag the column header from the table to the customization box.

After you have finished with adding and removing columns, you can close the customization form.

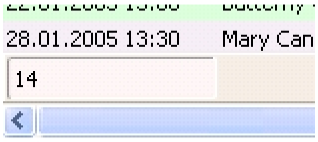
Other options for column customization

In addition to the column customization, you have some more table customization options available. When you right click with your mouse on some column header, selection menu appears. There you can select for example alignment for the current column.

Also you can select if you want to see the table and group footers or not.

Summary field

In the table footers you can see summary fields. For each table there is at least one summary field. By default it is on the first column and it counts the records seen on the table:.



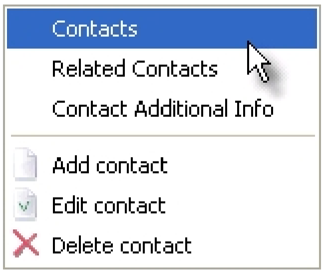
You can add additional summary fields to your table. When you right click on the table footer with your mouse, you can select what you would like to see for this column. For text fields you can show only the record count, but for numeric fields like Total or Tax in the sales module you can select also Min, Max, Sum and Average.

3 Modules

3.1 Contacts

The central element of the program is contact. Contact can be your customer, vendor, partner, friend, or anyone that you need to keep track of.

When you open the Contacts menu item on the main window, you have the following options:



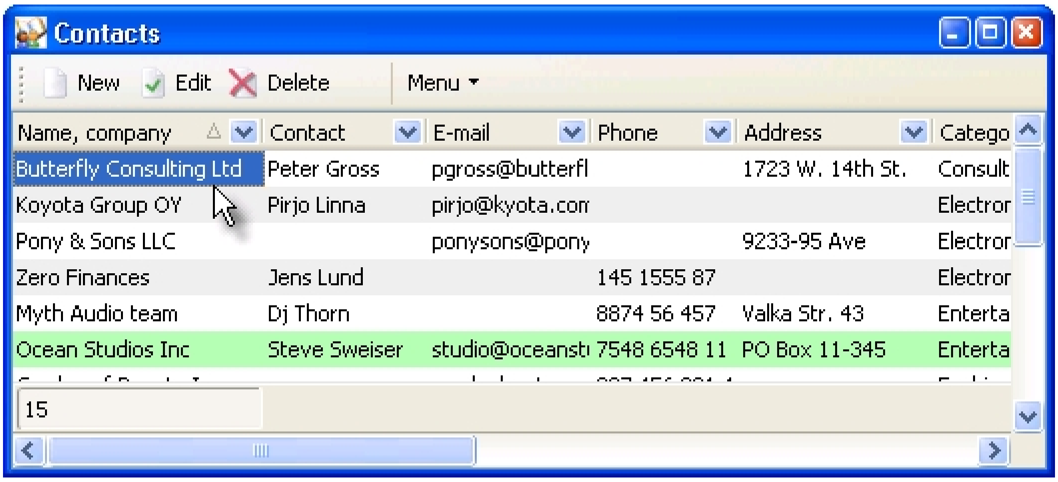
"Contacts" selection will open the Contacts list window where you can manage contact information for all your contacts. That includes their addresses, phone numbers, email and web site addresses, etc. In addition to base information, all contacts can be divided to groups based on different characteristics you choose.

"Related Contacts" allows you to manage sub-contacts. Sub-contacts are related to some of your main contact record. Each contact record can have unlimited sub-contacts. For example in cases the contact is a company, then in the "Related Contacts" panel you can list sales representatives you are dealing with from this company.

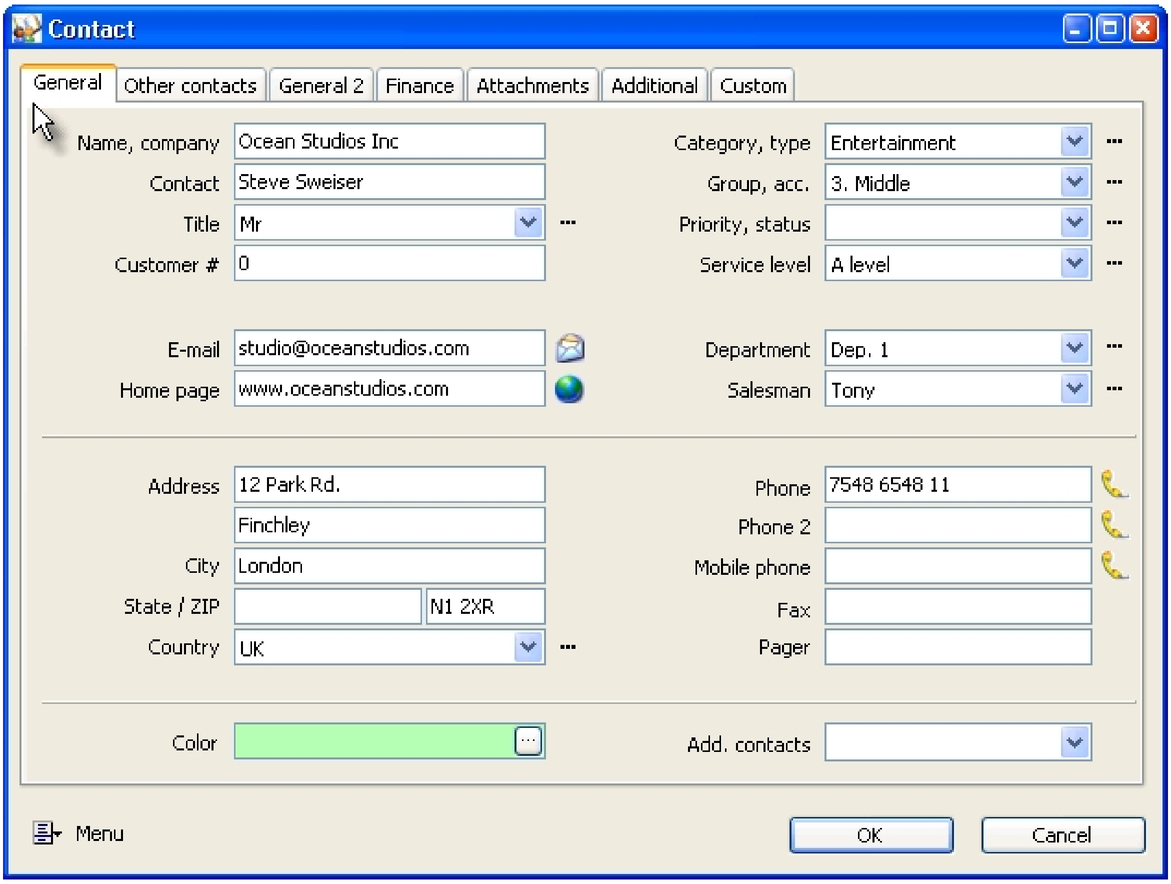
"Contact Additional Info" is custom information you would like to keep directly related to the contact. It allows you to add additional characteristics to your contact.

3.1.1 Contacts list

In the Contacts list window you will see the table with all your contacts. As written in the User Interface chapter you can sort, search, group and filter your contacts in this table.



When you add or edit some contact, Contact Detail window appears, where you can enter or select all the base information for your contact:



Most important information about the customer can be found in the "General" panel.

If you should need to keep track of sub-contacts for this contact record you can do this on the "Related contacts" panel.

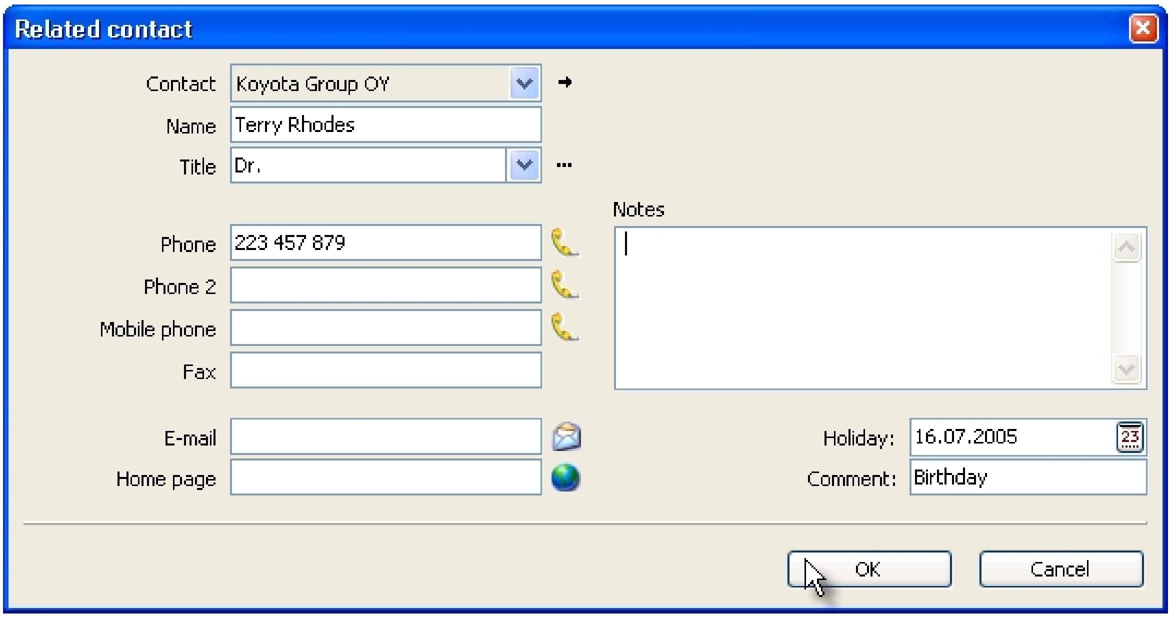
In the General 2 and Finance panel additional info can be entered about the contact.

Attachments can be linked to your contact record on the Attachments panel.

Additional info and Custom panels enable you to keep additional characteristics about your contact if you should need to. If you do not need to see all those panels on the Contact Detail window, you can hide them in the program options.

3.1.2 Related contacts

As stated above, each contact record can have unlimited sub-contacts (related contacts). For each related contact you can enter the base contact information and some notes:



When the base contact is selected on the related contact detail window, you can click the "->" button at right of contact selection field to bring up contact details. This allows you to check contact details when entering related contacts directly from the "Other contacts" window and not from the Contact detail window.

You can also use holiday reminding system for your related contacts. When you fill in the Holiday date, the system will notify you when necessary about upcoming holiday for this contact. You can read more from the "Holiday Reminders" chapter.

3.1.3 Contact additional info

If you need to keep additional characteristics about your contacts, then you can do this on the Contact Additional Info window. Each contact can have unlimited records of additional info. In addition to details and date, you can select the group name for each additional info record.

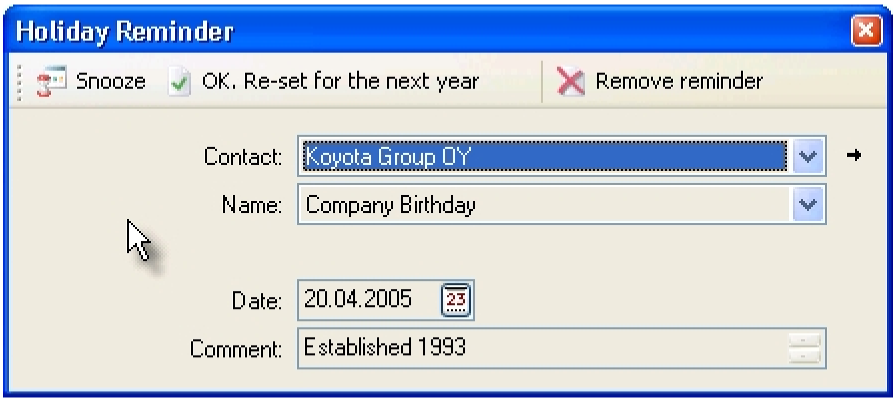
By using additional info records you can also use them as holiday reminders. Each additional info record has a "Holiday reminder" option near to the date field. If the option is checked, holiday reminding system is monitoring this record for necessary notification. Holiday reminder is described more close in the next chapeter.

3.1.4 Holiday Reminders

As you might have read, each additional info record added to your contact, or related contact record can have holiday reminders set.

In the options, Contact panel you can set how many days before the holiday you would like to see the notification. Also you can set the snooze time. It means when you Snooze the notification then after some time you will see the notification again. By default this is one hour.

The sample holiday reminder dialog will look something like this:



On the top toolbar you have three option button available.

Snoozing is good if you do not have the time to take a look at the holiday right now, but would like to react on the reminder. By Snoozing, you can do this later.

"Re-set" button will push the holiday one year forward from its original date. Use this button in case you have acknowledged the holiday and would not like to see it again for this year.

"Remove reminder" will disable the reminding of this holiday. If the holiday is from contact additional record, the "Holiday Reminder" option will be unchecked. If it is a related contact holiday then the date field is cleared.

No matter which button you clicked, the reminder dialog will be closed automatically after that.

3.2 Activities

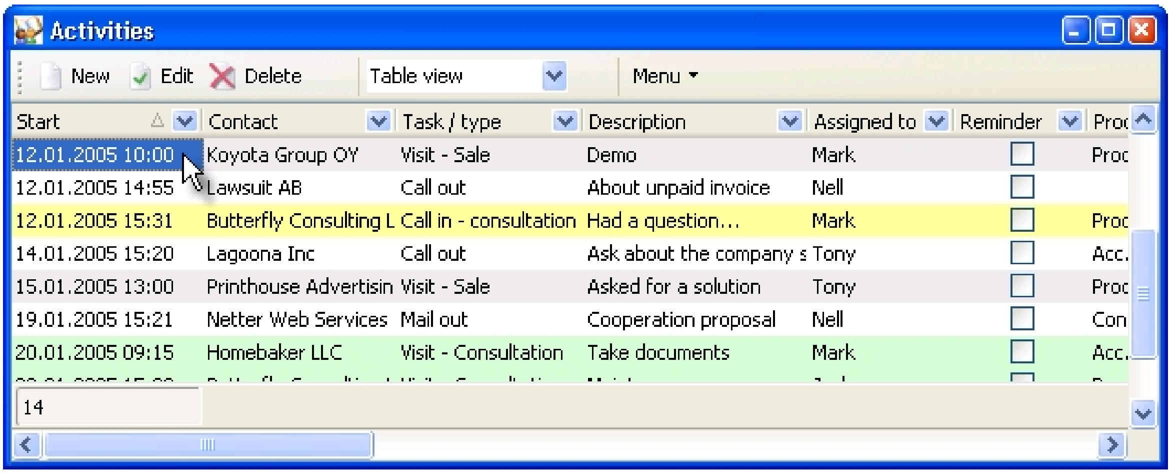
Activity is any kind of interaction with contact. This includes phone calls, letters sent or received, meetings, scheduled events, etc.

To open Activities module, use Activities menu in the main toolbar.

Once the module is activated, you can select the preferred working view from the Activities module top toolbar. You can select between "Table view", "Day view" scheduler and "Timeline view" scheduler.

3.2.1 Activities list

In the Activities list window you will see the table with all your contacts. As written in the User Interface chapter you can sort, search, group and filter your activities in this table.

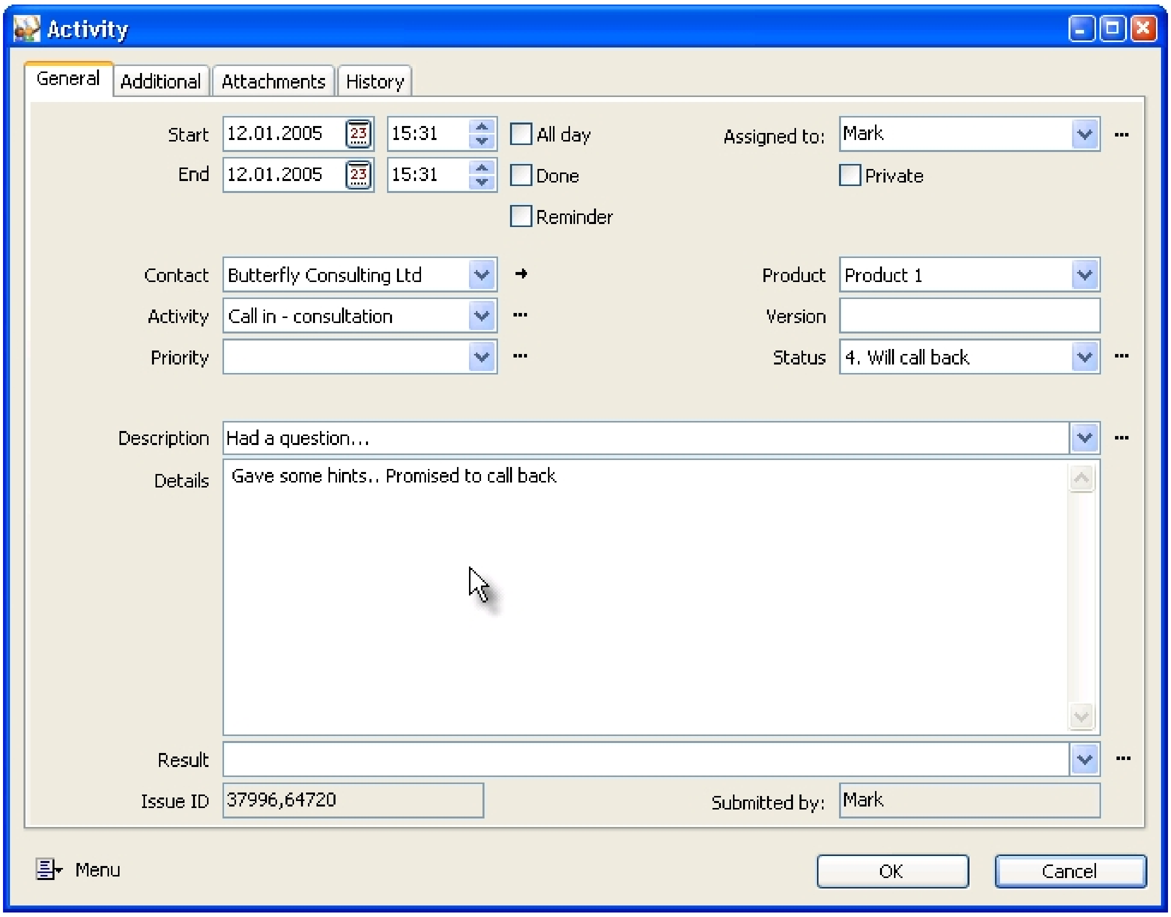


In the activities module Menu button has additional commands compared to other modules "Send to e-mail". Selected activity details can be emailed to customer or to the user the activity is assigned to. For both them, separate "templates" can be used. So when you select the command to send email, your default email application is opened with new email. All the fields are filled and body text written based on the template. You can change the text if you need to, and can then send the email out.

Email templates are set in program options. More information about templates is found in the "Program Options - Activities - Templates".

Also archive management is available under the Menu button. Archiving is discussed closer in the "Archive management" chapter.

When you add or edit some activity, Activity Detail window appears, where you can enter all the information related to this event:



As you can see, on the detail window you can set start date and time for your activity, as well as end date and time (if the "All day" option is not checked).

If you want to use reminder for this event, check the "Reminder" option and from the appearing field select how much before you would like to get the notification for this event.

You can select also the user to whom this event is assigned to. If the "Private" option is checked, other users can never see this event.

Issue ID is assigned automatically to each activity created. This unique number can be used as a reference number for activity in communications between TK8 Contact users.

By filling other fields on the General panel you can enter different kind of information about the event. On the Additional panel there is more fields available for filling and describing the event.

Similar to contacts (and all other modules), unlimited number of files can be linked to activity. For example contract regarding the partnership progress.

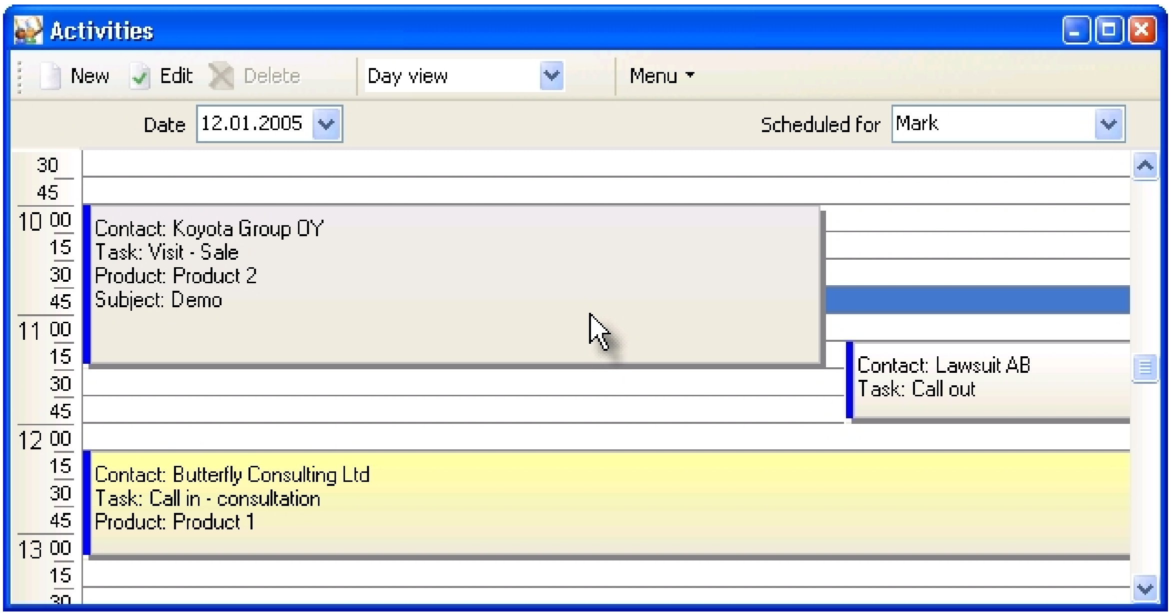
If not disabled in options, each activity keeps also history about every field value changed. This enables you to use one single activity and change it in time when there is a need. And you can always see how it involved. For example you can create activity with description "Possible partnership" and fill other related fields. Now, when there is some progress related to this activity, you can change those fields - for example date, and replace the description with "Partnership discussion in progress". Once the activity is completed, you can always see the history of this

activity.

Activity history can also be used as a security solution. You can be sure that users can not delete or change the information without the marks leaving behind.

3.2.2 Scheduler - Day view

Day view represents all your activities in the calendar view. In some cases it will give you a better overview of your activities and allows you to concentrate to activities of some specific day.



With Date field you can specify the date you need to work with. By default the current date is offered, but you can change this by clicking the drop down button and selecting the new date, or you can just type in the new date. Once the date is selected or entered, you need to move away from the field so the date would be applied. To move away from the field, you can press TAB button on your keyboard, or activate some other field on the form.

Day view allows you to see only activities assigned to some specific user also. For this you can use "Scheduled for" field and select the user whose schedule you would like to see. After you have set user filtering but then want to see all activities again, just activate the filtering field and delete the value from inside. Once the field is empty, move away from this field and the filter is cleared.

To add activity in the table view, you can use the "New" button on the toolbar, similar to the table view. Or, you can also press the Insert button on the toolbar. In the day view, when you add new activities, date and time fields are automatically filled with the values representing the selected area on the panel. It optimizes the time you need to spend to add new activity. So instead of typing the date and time values, just drag with your mouse and select the block on the view that represents the upcoming activity start and length. After the right lines are selected, press Insert key or the "New" button.

Similar to table view you can edit your activities by selecting them and pressing the "Edit" button, or you can just double click with your mouse on the activity you need to edit.

Deleting activity in the day view is possible only by using the "Del" key on your keyboard. Before deleting select the activity you need to delete and press the Del key.

It is easy to re-schedule your activities in the day view. You can just move and resize each activity on the panel. To resize, first activate the activity by clicking on it. After activated, move your mouse to the top or bottom line of activity, until the cursor changes its shape. Then press the left mouse button and move it up or down until the activity has the size you need.

To move the activity on the panel, move the mouse to the left side of activity (to the left side line), until the cursor changes. Then, press and hold the left mouse button. Until the mouse button is down you can move the activity to new location. After re-located, release the mouse button.

By resizing and moving all time fields of activity are changed automatically.

When you have many activities on the screen, or your activity is too short to display an overview of event, you can still quickly see it. Just move the mouse cursor to the activity you are interested in. Do not press the mouse button, but just wait a second, until the hint balloon panel appears. This appearing panel has the quick info about your activity. When you move your mouse away from the activity, the hint panel disappears automatically.

Similar to other modules, you can see the quick info for the related contact. For this just activate the activity and then right click on it. After clicked you can immediately see the contact quick info panel appears and you can use the information on it to start a phone call for example.

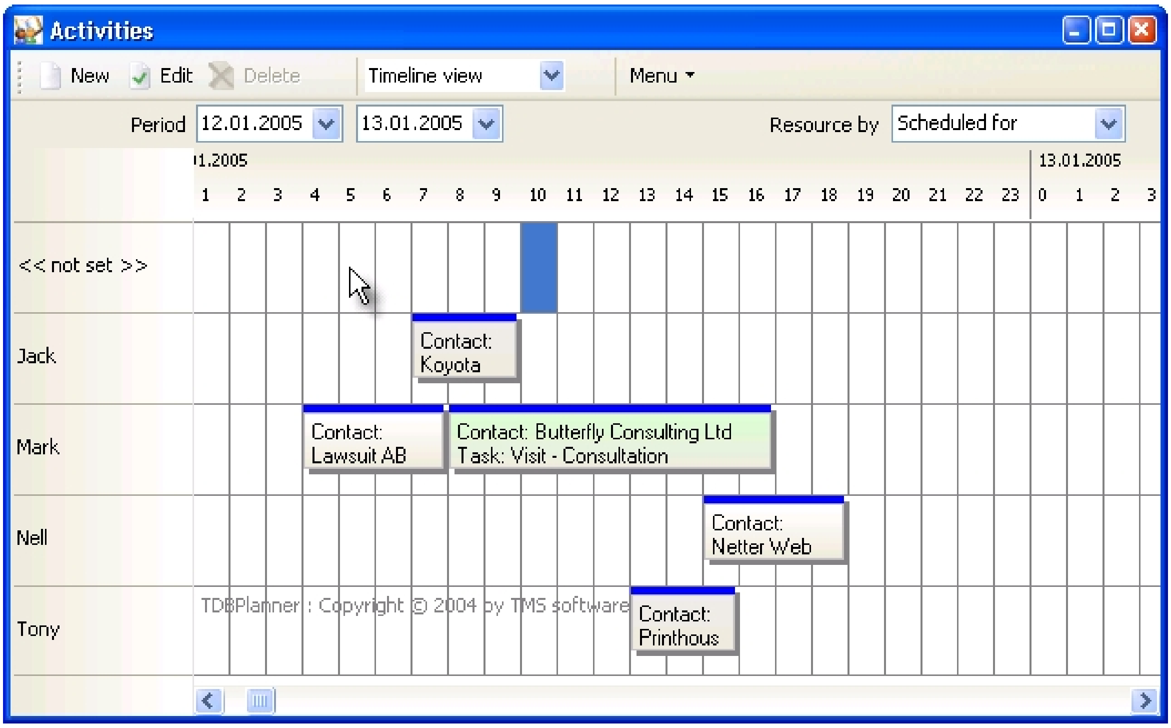
In the program options you can specify different options and settings related to the day view. More information about these settings can be found in "Program options" chapter.

3.2.3 Scheduler - Period view

Period view is another graphical representation for your activities table. It is often called as "Resource view". It means the activities are grouped and listed in separate rows based on the resource field value. Time is listed in columns.

You can select the resource field used to group the view. You can select the grouping between "Scheduled for", "Task" and "Product" fields.

Instead of particular date in day view, you can select the period length you want to see in the current panel.



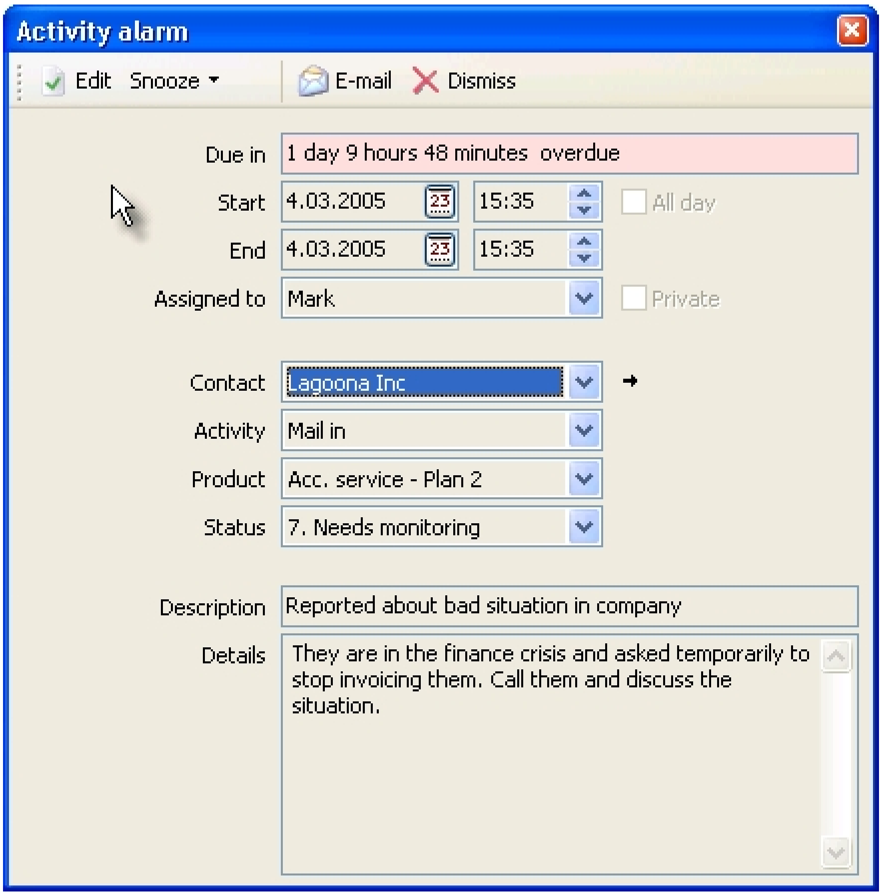
Managing (adding, editing, moving and resizing) activities is similar to day view.

In the program options you can specify different options and settings related to the period view. More information about these settings can be found in "Program options" chapter.

3.2.4 Reminders

For each activity you can set up reminder. On the activity detail window when you check the Remaindering option, you can select how much time before the event the reminder should appear.

Once the reminding time arrives, a reminder appears with information related to the event:



If you want, you can directly edit this activity by pressing the "Edit" button on the toolbar. This is useful for example in cases you want to set the activity as completed ("done").

If you want to push forward the reminding for this event, click on the "Snooze" button and you can select the time how much you would like to push forward reminding this event.

By clicking e-mail button you can send the reminder email to the user the activity is assigned to. Email reminding can be automatic also, if set so in the options. In that case you do not have to click the e-mailing button manually.

If you want to disable the reminder for current activity, click the "Dismiss" button.

If you just close the reminder dialog without snoozing it, or disabling the reminder (for example accidentally closing the dialog), the reminder will re-appear after a minute.

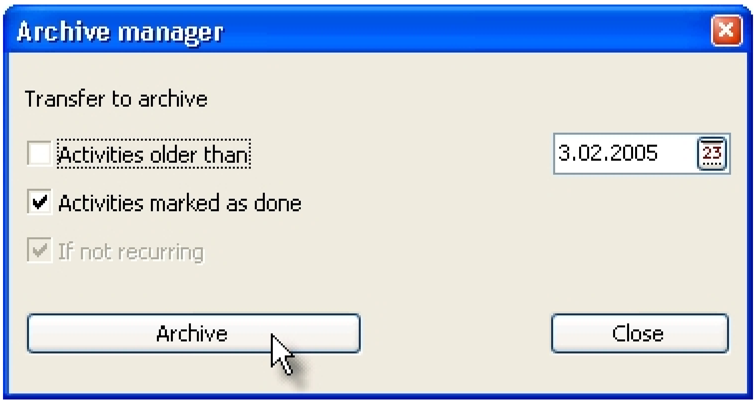
Please note that the program has to be running if you want to use reminders functionality. If the program is closed, you will not see reminders. Of course, when you once start the program, and some reminder is missed, it is displayed right on the program startup. There is no matter what module you are using or are you using the program at all - if the program is running (even in minimized mode), the reminders are working and displayed to you.

Also, reminders are user specific. It means only user the activity is assigned to will see the reminder. If the assigned field is empty, all users will see the reminder.

3.2.5 Archive management

Once you have completed activity, then you can move it to the archive at one point. In that way your activities table remains small and quick to handle and you still have the information in archives.

When the activities table is too large, it would be harder to find important activities. So you can move finished or older activities to the archive. To do this, click on the Menu button on the Activities module toolbar and select "Archive manager".

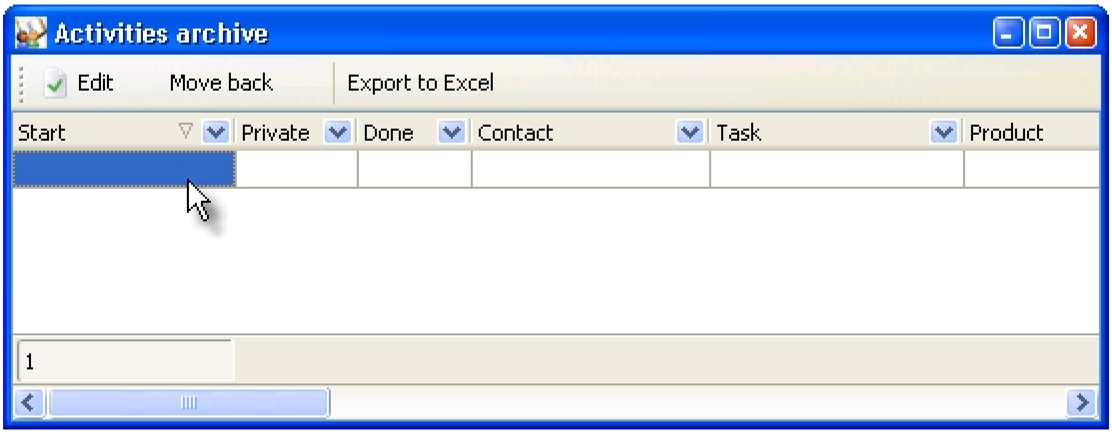


Archive manager allows you to move a group of activities to the archive automatically and quickly. By checking "Activities older than" option and entering the date, all older activities will be moved to the archive.

Or, you can check the "Activities marked as done" and all activities finished will be moved from the main table to the archive table.

To start archiving, click on the "Archive" button.

To see archived activities, open Menu button and select "Open archive".



In the archive you can still edit the activity, and if you want, you can also move the selected activity back to the main activities table.

3.3 Sales

Sales module is where you keep you track your income and expenses. You should be able to register every penny moving in or out of your business.

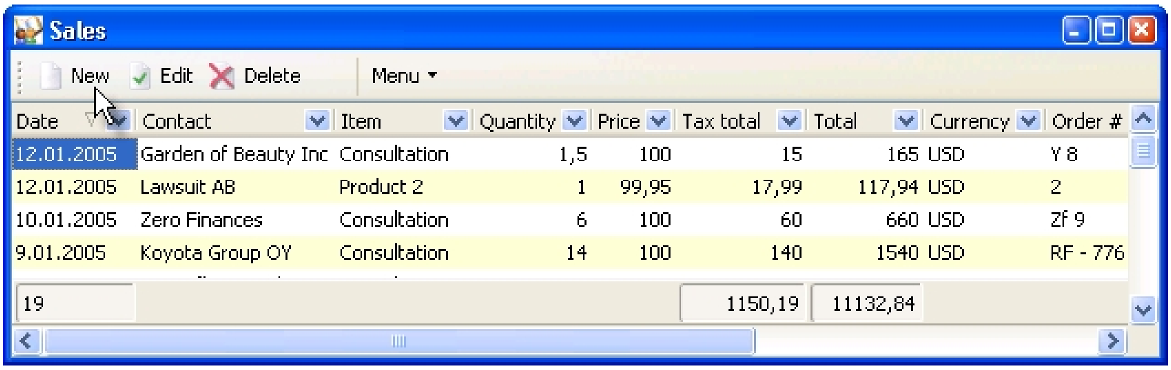
By analyzing all this data later you can get a true and very detailed overview about your customers in money terms. For example what customers (by location, size, type, or other specification you are using) are more profitable and which ones will lose your money.

You can enter the sales and expense information manually or use the data import module to bring it in from another sources. By importing you can bring in your accounting or e-commerce provider data for analysis with one easy step. So even when you keep your financial data in some other program you still can analyse it in customer perspective.

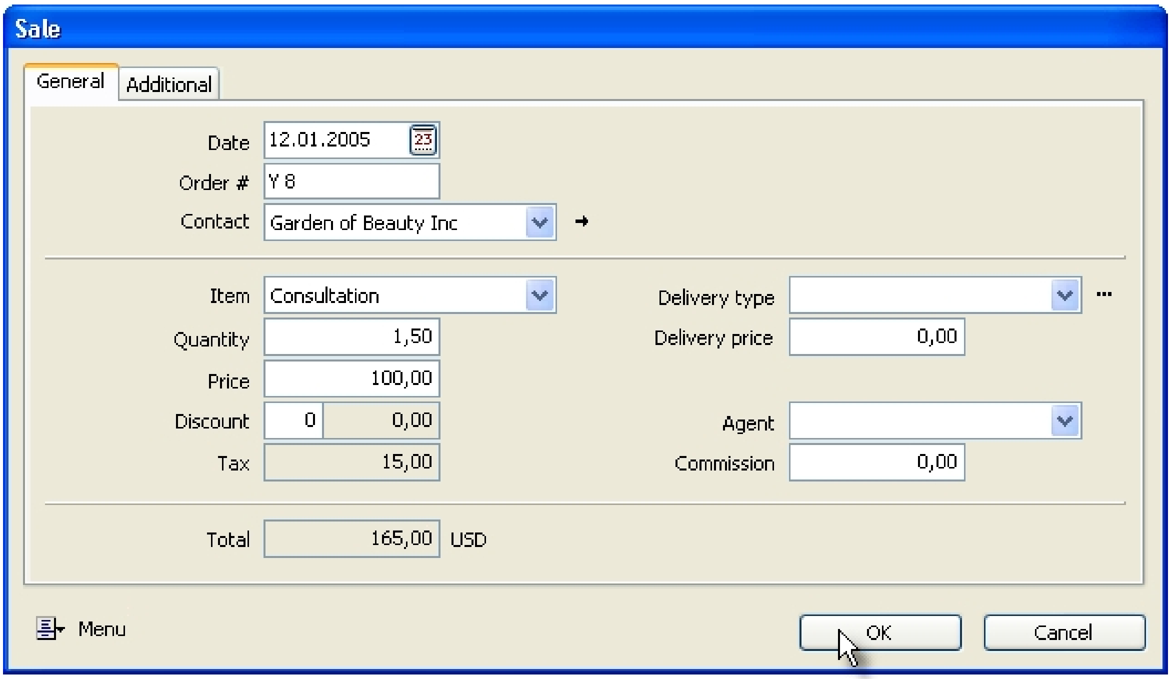
By opening the Sales menu on the program main toolbar, you can select between Sales, Invoices, Purchases, Bills, and Opportunities. Following chapters will give you the overview of what kind of data you can should and can maintain in those modules.

3.3.1 Sales

In the sales module you can enter and manage all your sales transactions. Handling entries is similar to other modules.



In the sale detail form you can use different fields describing the transaction. In addition to default fields, Additional panel has also 15 custom fields available.



When you select item on your sales form (from the list of inventory entries), and enter the quantity, total is calculated automatically. Behind the scenes also net total is calculated for later analysis where tax, delivery price and agent commission is excluded from the sale grand total.

In the additional panel you can also set if the sale is refunded for some reason, set the payment type, select your sales representative and enter notes.

Recording sales in this module is item specific. It means when you sell Red Widget and Blue Widget with same order, and would like to track and analyse them separately you have to enter 2 sales (one for Red Widget and other for Blue Widget). When you sell 10 Red Widget's, then of course you can enter only one record, with quantity of 10.

Handling your data in this way (to keep separate records for separate items) enables you to track e-commerce sales in the best possible way. When you sell two items to the same customer at the same time, you still have two separate orders in most e-commerce system. Keeping the items in separate records allows you to import these transactions and enabling flexible analysis.

If you need to enter more than one item per sale, you can use Invoices module instead of sales module. In the invoices module you can add unlimited products to one transaction (invoice sale).

3.3.2 Purchases

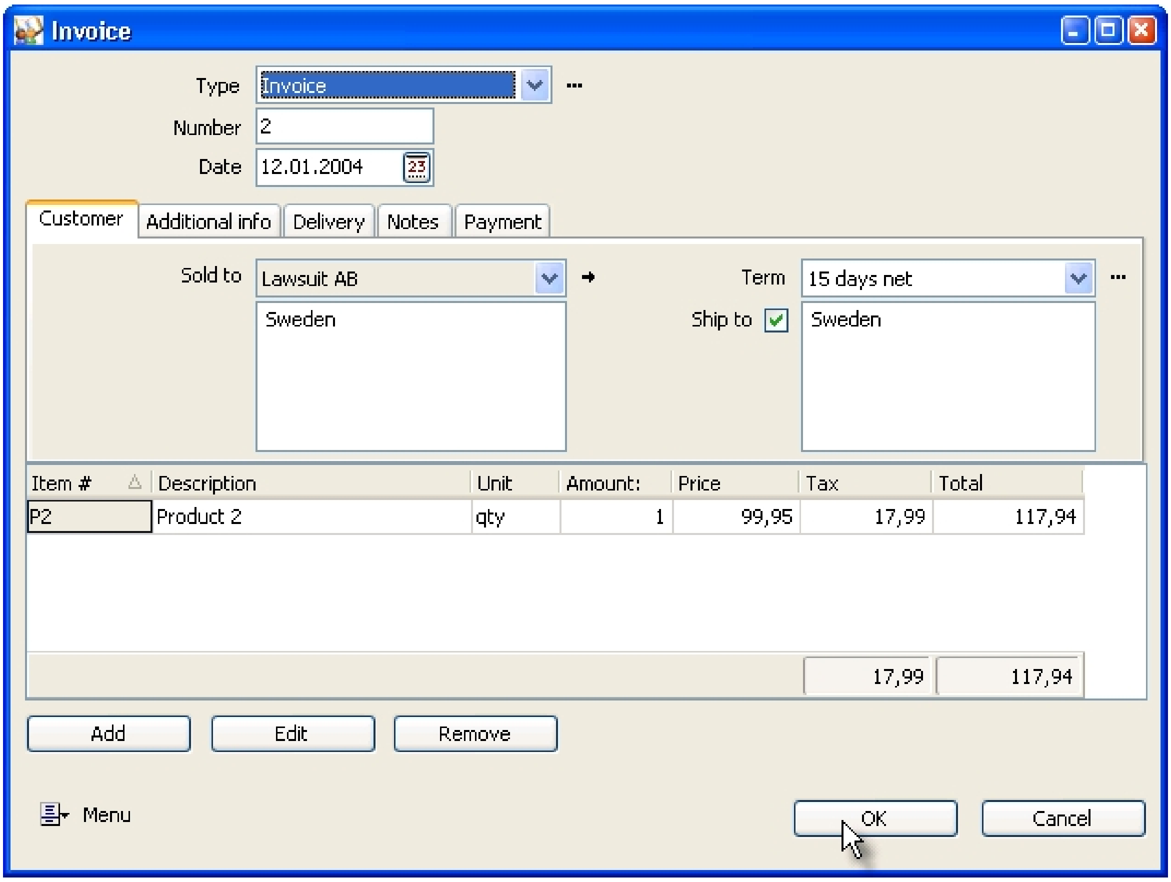
Using purchase module is exactly the same as using Sales module. The form and table view looks also the same. The only difference between those modules is that when sales module is for tracking incoming funds and sales, then in purchases module you can track expenses.

3.3.3 Invoices

With the help of Invoices module you can write and send out invoices to your customers. So when you don't need accounting level behind the invoicing, you can use TK8 Contact to write your invoices.

Another solution would be to create quotes for your customers, if your accounting software does not allow that, or you would like to keep quotes separate from the accounting data.

On the invoice dialog when main fields are filled and customer selected, you can add items to the invoice by using the "Add" button. To edit or remove items on invoice, use Edit or Delete button.



Once your invoice is ready you probably want to print or email it. You can do this when you click on the Menu button on the invoice detail form. The menu appears from where you can do your selection.

Print command will print the invoice immediately and Preview allows you to preview it first on the screen. By using the Redesign command you can change the layout used for your invoices. After "Redesign" is selected, Report Generator appears where you can do the changes you like. More information about how to change the layout can be found in the Report Generator chapter.

When you select "E-mail invoice", the program will automatically print the invoice to the Acrobat Reader PDF file. After the PDF file is ready, new email is created with your default email software, and that file is added as attachment. Also the customer email field is automatically filled based on the customer email address selected to the invoice. After the new email window appears, you can manually edit the subject and message body, and just send out the invoice.

You should know that each item selected to the invoice is represented also in the sales module. It means when you sell Red Widget and Blue Widget together with one invoice, two additional sales are listed in the sales module. It allows the program to analyse the sales data better. As both your single e-commerce sales and invoice details are represented in the sales module, you need to analyze only sales data from one place to get the overview of your incomes. You do not need to analyze e-commerce transactions and invoice details separately.

3.3.4 Bills

Using bills module is exactly the same as using invoices module. The form and table view looks also the same. The only difference between those modules is that when invoices module is for you to create and send out invoices, then in bills module you can register incoming bills you receive.

3.3.5 Inventory

In the inventory module you can list all the items you would like to use on invoices and in sales transactions. These items can be products and product variations, and services you offer.

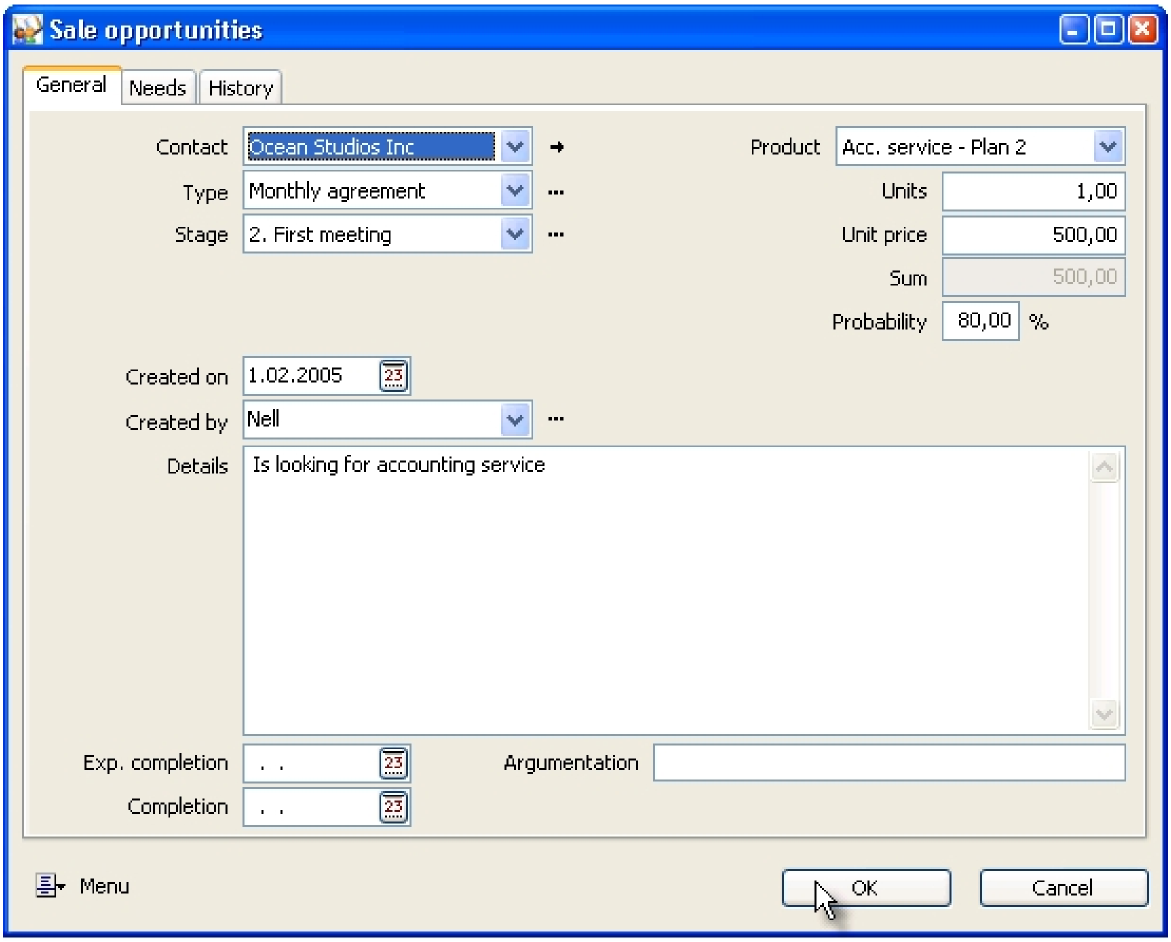
In the inventory detail form you can select categories, currency and other values describing the item. Also you can set the default price and tax rate used for this item.

3.3.6 Opportunities

Opportunities are the sales you are expecting to get in the near future. For example you can register negotiations you are keeping to get some particular sale. Though opportunities are somehow similar to activities it is easier to handle this kind of information when it is in separate module.

When you open up the opportunity detail form, you can fill in describing fields, what product the customer is interested in, and on the needs panel you can fill in your customer problem, solution and value. When customer contacts you, they have a problem they want to solve. On the problem

field you can describe it so each time you make a contact about this possible sale, you know their problem. For each problem you can offer some solutions. You can write down those to use in your conversations. The value field can be filled with values your customer receives by getting on to the deal.



Similar to the activities, opportunities are "moving in time". It means you can change the values on the form and the program keeps the history automatically of what was changed (so you can always look back of how the sales progress involved). As long the opportunity is "open", you will work with it. Soon you close the sale, you as a sales person can set the opportunity as closed and concentrate on new opportunities.

3.4 Communication

Communication module allows you to keep in touch with your contacts and prospects. It is easy to send out personal emails or letters to your contact groups. Subscription module can automatically manage your information newsletter subscription emails. Also tracking your marketing campaign information is possible in this module.

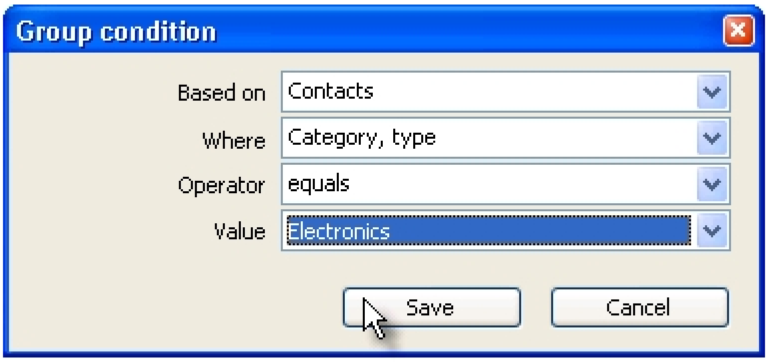
3.4.1 Group mail

With the Group Mail module you can send personal e-mails or letters to your customer groups.

When you add or edit a new mail, you can select the type - whether it is a letter or e-mail. From this depends what contact information is available for you. When you select "E-mail", you can enter the subject and the priority. Also you have to select the "From" field value, which indicates the settings used to send out the emails. If the From field is empty, you can click the "..." button at right of the From field to add a new mail account. Creating a new account might require a knowledge about your e-mail server and account you are using to send out your emails.

The most important step in writing emails or letters is probably setting up the conditions. Conditions indicate which contact group should get this mail. Under the conditions table you will see the following toolbar:

To clear the current conditions you can click on the "Clear all" button. When you add a new condition, you can first select the module to which information you would like to use to form the group. In the sample image below we selected "Contacts". After the module is selected, on the Where field you can select which field is used to form the group. After the operator is selected, you can either select the value or type it in (for date and text fields).



The conditions above will generate a group from your contacts where their category is "Electronics". If you would like to send your email to all your contacts, you still have to set up the condition. For this, set up a condition that matches all your customers. For example "Base don Contacts where Name does not equal XZXZZXZX". As you probably do not have such contact, all contacts will be added to your recipients list.

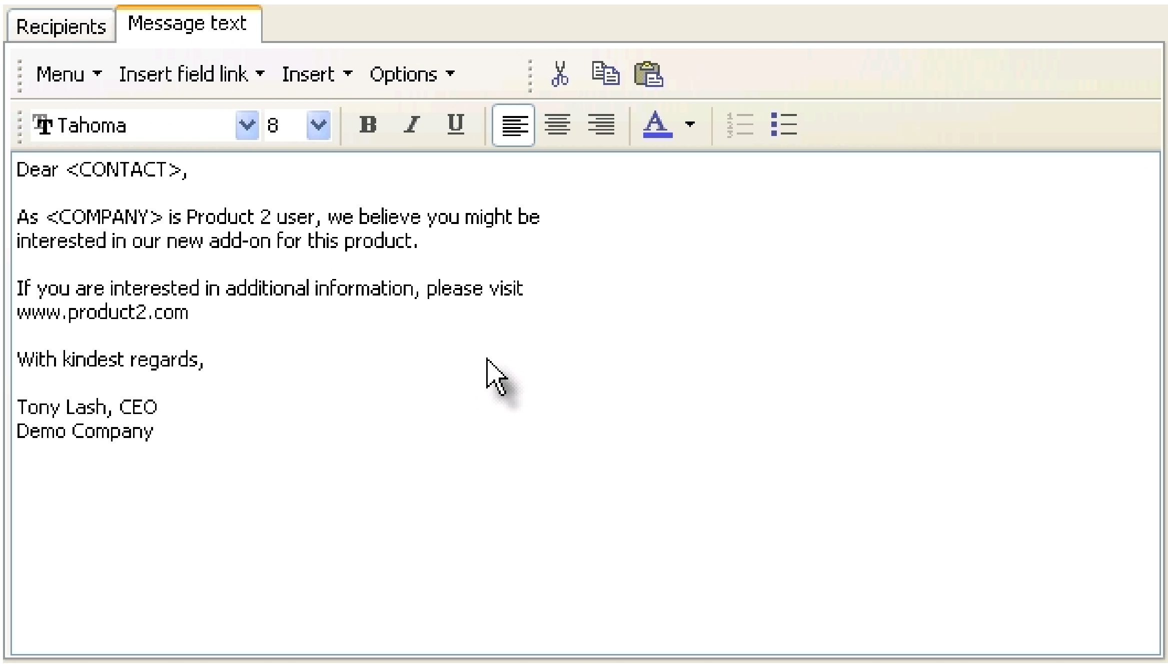
After the conditions are set, you can finally form a group from the contacts that belong to that group. For this, under the "Recipients" table you will see the following toolbar:

When you click the "Refresh by conditions" button on the Recipients toolbar the Recipients list is updated. If you need, you can remove some contact from the generated recipients list or add some contact manually.

"Set status" button allows you to change the status of the mail for this contact. When you are

sending emails, the status is changed automatically. When the status is "Added" then next time you send out emails it will be sent to these contacts. When sending fails for some contact in the list, the status is set to "Sending failed", otherwise "Sent". When you would decide to re-send the email, it is not sent to the contacts where the status is "Sent". So you can be sure your contacts will not get the same email more than one time. Though, if you need or want to resend to all your recipients, you can clear and re-generate the list. By re-generating, the status is also cleared. You can also use the status button for example for cases where you call to your contacts and confirm if they have received the email. In that way you can set the status as "Confirmed", for example.

Once recipients are set, you can concentrate on the "Message text" panel:



Before you start writing the message, you can select in which format the email is written. From the Options menu button you can select between "Plain text" and "Rich Text". Also, you can send out pre-formatted HTM emails. From the Options menu you can also save the message text you have created, or open the earlier created text.

The difference between the Plain and Rich text messages is that you can not format Plain text messages. Plain text messages were popular years ago when many email programs were unable to display rich text emails. Today plain text is still popular as emails are small in size. When you send Rich text emails, they are a bit larger to receive for your contacts, but you can select the font style, color, alignment, etc. for your text.

When the Rich text is selected as a message format, you can use toolbar on the top of text area are similar to popular word processing programs. You can use the buttons and selections to change the font style, color, alignment, etc.

When you are typing in the text, you can use Insert menu button to quickly add parameters to your text like today's date, your company name etc.

The main idea behind group emails is that you can send out **personal** mails. You can do this by using Field links. When you open the "Insert field link" button, you can select which field value should be used inside your message. For example on the above image there is <CONTACT> selected. When you email or print the message, the field link is replaced with the value taken from

the recipient contact card. So instead of "Dear <CONTACT>" your email or letter will have "Dear Mr. Kask", for example.

Once the message text is ready and recipients selected, you can email the message or print your letters. For this click on the Menu button on the message text toolbar and the following menu appears:

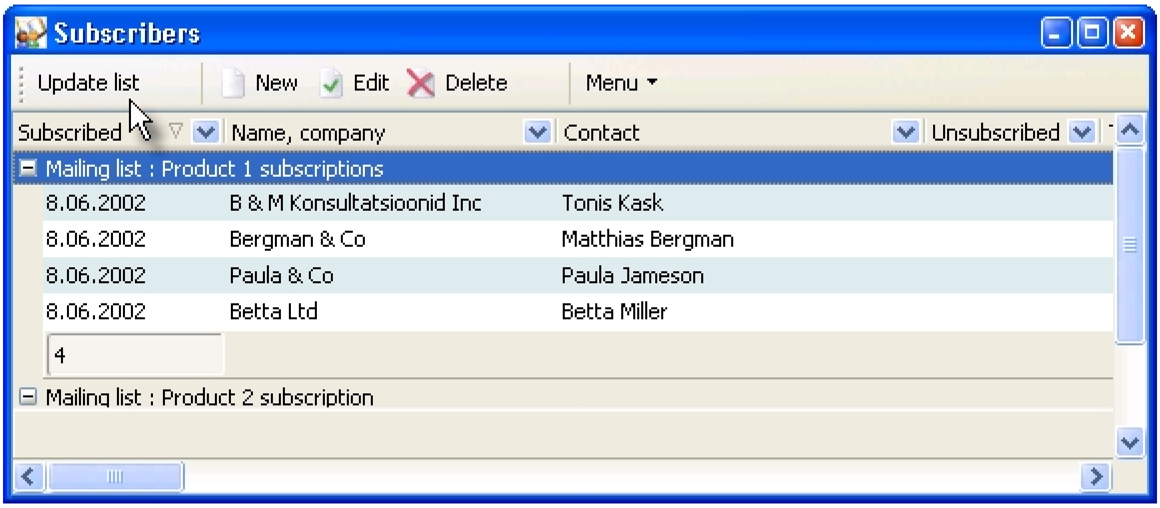
When you select "Send emails", additional panel appears where you can see the progress of sending emails. Please be patient on sending out emails, as it can take up to a second to send out one email. If you have about 100 recipients, sending out your emails can take several minutes.

Also, from the menu you can select to print the message as a letter, or print envelopes for your letters. You can also re-design the letter template (to change margins, for example, or change the location of the address on the envelopes.

3.4.2 Subscribers

Subscribers module is designed to maintain information about people who are interested in getting periodical information from you but are not yet your customers or vendors. They can be also your customers, but they are maintained separately in this module.

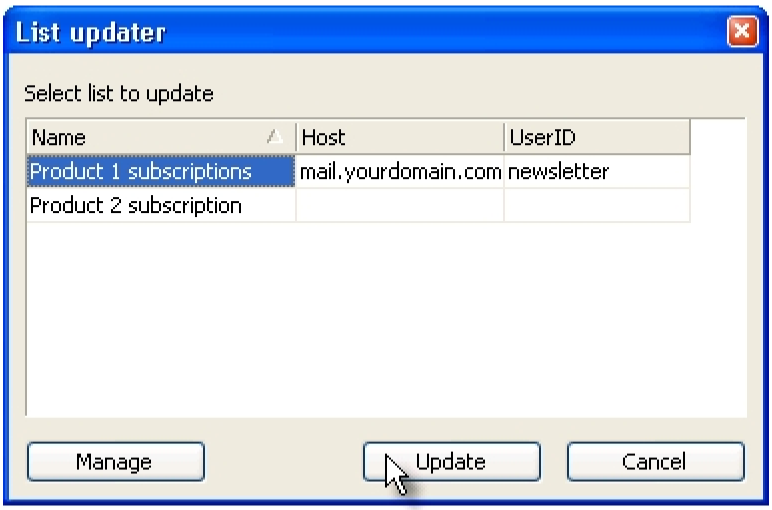
The module can automatically accept incoming requests by email to join the information list. Also unsubscriptions can be managed automatically. Also, the requests can be divided to different groups, so you can set up different interest groups.



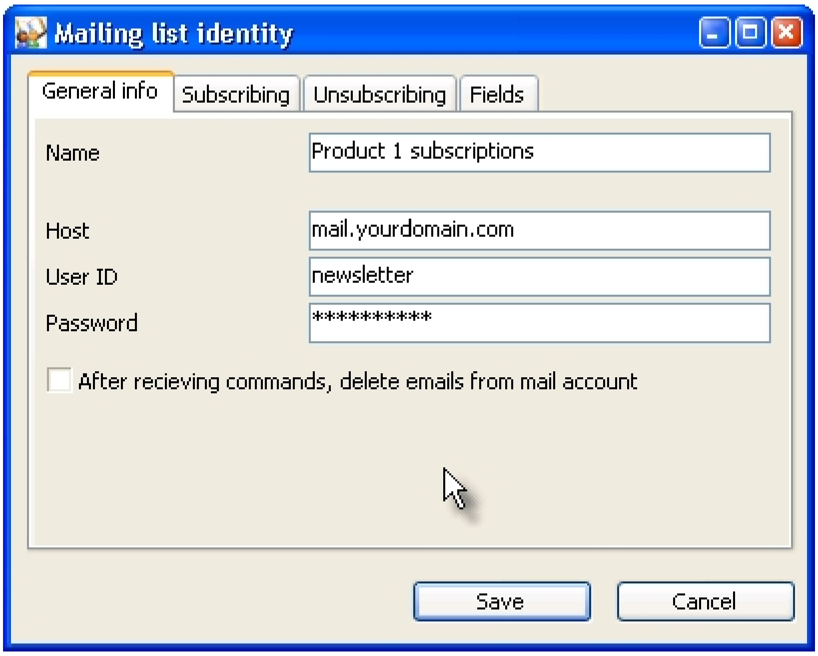
You can add or edit the list manually, but to set up automated system, click on the "Update list" button on the toolbar.

The automatic mode works in the way that for example in your home page you have a form where people can enter their information and send it to you. You can also have the form to accept unsubscription requests. Each requests posted on your web site, has to be sent as an e-mail to some of your e-mail addresses. We suggest you to make separate mailbox for subscription emails. Once you have that mailing system set up, you can also set up TK8 Contact to automatically handle those e-mails.

When you already have subscription group(s) set up, you can just select the group on the "List updater" window and click on the "Update" button to receive new subscription and unsubscription requests.



When your list is empty, you have to create a subscription group first. For that click on the "Manage" button and from the base information dialog add new identity.



Next step on setting up or editing the group is to enter the server address (host) where you keep this special mailbox you created to manage subscription emails. Also, you have to enter the user ID for that mailbox and a password, so the program could access this mailbox.

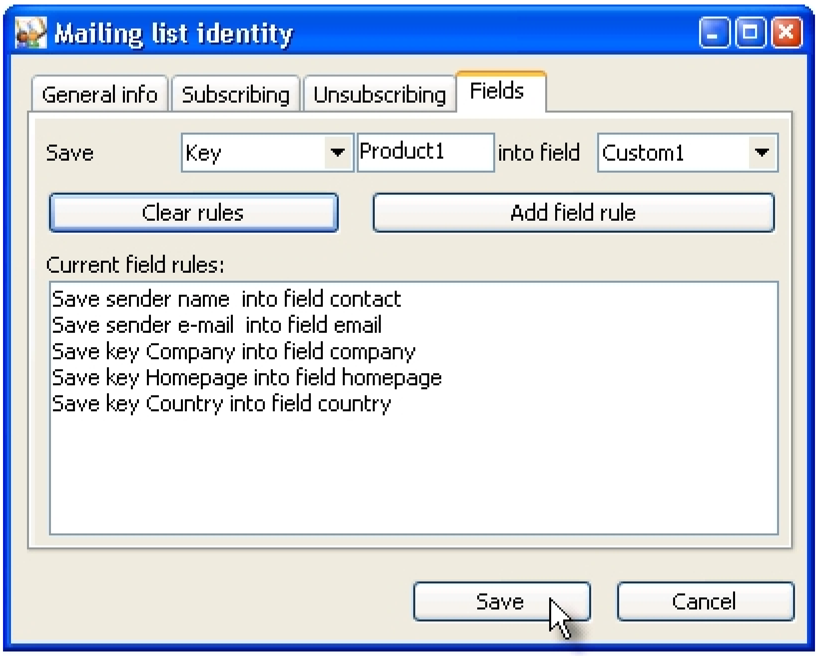
You can also set whether you like to keep the mails in the server after requests are processed, or you would like to delete emails already processed.

On the "Subscribing" panel you have to set how the program should identity the request to add a new subscriber to the group. First possibility to recognize the request is to use the sender e-mail address (sender should be the subscriber). If the e-mail address is not in the list, it will be added. Also, you can set to subscribe the request if the subject or message body contains some particular word or the ID you know.

Unsubscribing setup options are the same as in Subscribing panel.

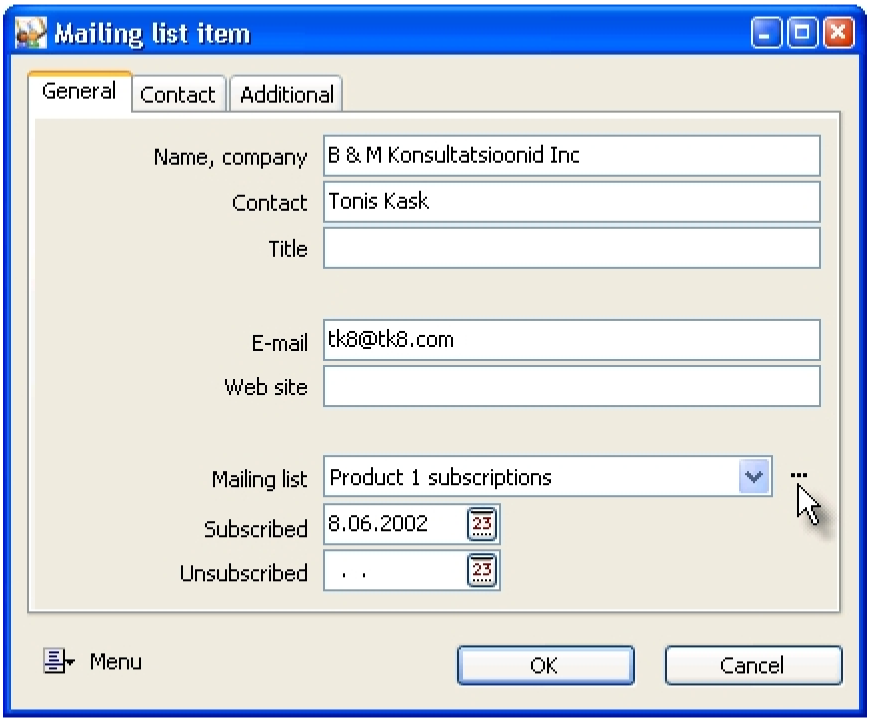
Once Subscription and Unsubscription methods are set up, you can specify which fields should be extracted from the email. For example, the email body can look something like that:
==
Company = Black Cat Sonic Arts
Homepage = www.blackcatsonicarts.
==

Now, if you want to save the company name from the email to the subscription form, you have to set up fields:



To set up a field, fist select from the selection box if it is "Sender name", "Sender email", "E-mail subject" or "Key" you want to save. If it is a Key, you have to type the name of the key. Key in the above example is "Company" and "Homepage". Key is just like a field name in the e-mail. Once the key is entered, as a first step you have to select the field to where you would like to save the value. After selected, click on the "Add field rule" button and you should see it added to the "Current field rules" list. You can have many rules for your incoming emails, depending how many keys are you using.

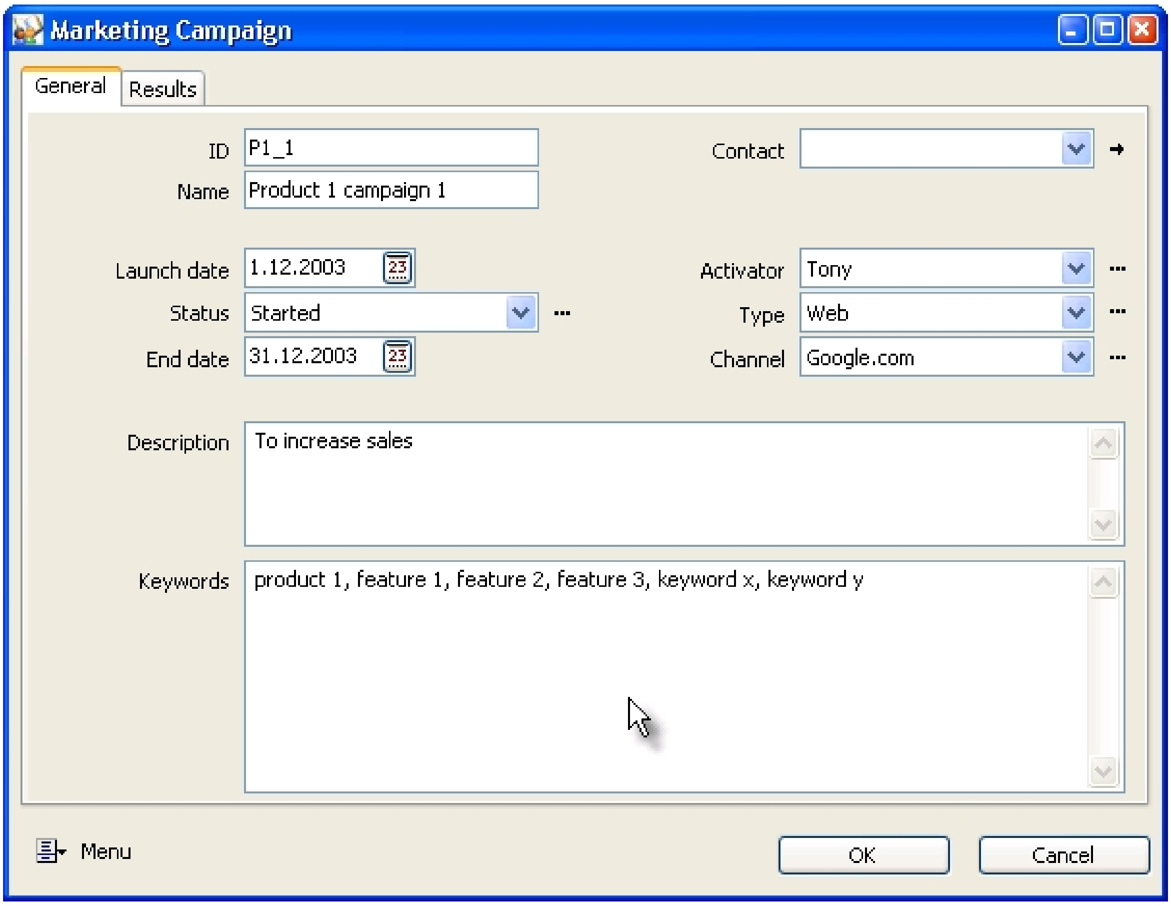
Once your groups (identities) are set up, you can click on the Update button on the list updater button and the emails are received and processed. After processing the email, the new record is added to your list. The program is filling also automatically fields like subscription date and should it receive the unsubscription request, the unsubscription date is added to the record. But the record is not deleted automatically. You can do this manually if you should want to.



Once you have a list of people interested in receiving information from you, you can use group mail module to send them a personalized email. When you are creating a recipient group, just make sure you add additional condition not to send the email to people who have unsubscribed. This rule should look something like "Based on 'Mailing list contacts' Where 'Unsubscribed' Operator 'is blank'".

3.4.3 Campaigns

Campaigns module is designed to register your marketing activities. For example price changes, ad clip purchase for a local radio station, running Internet campaign, etc. In additional to general information about the campaign, you can also track the results (if they are measurable).



By using campaigns module you would always know when and what actions did you take and what impact they had to your sales.

3.5 Statistics

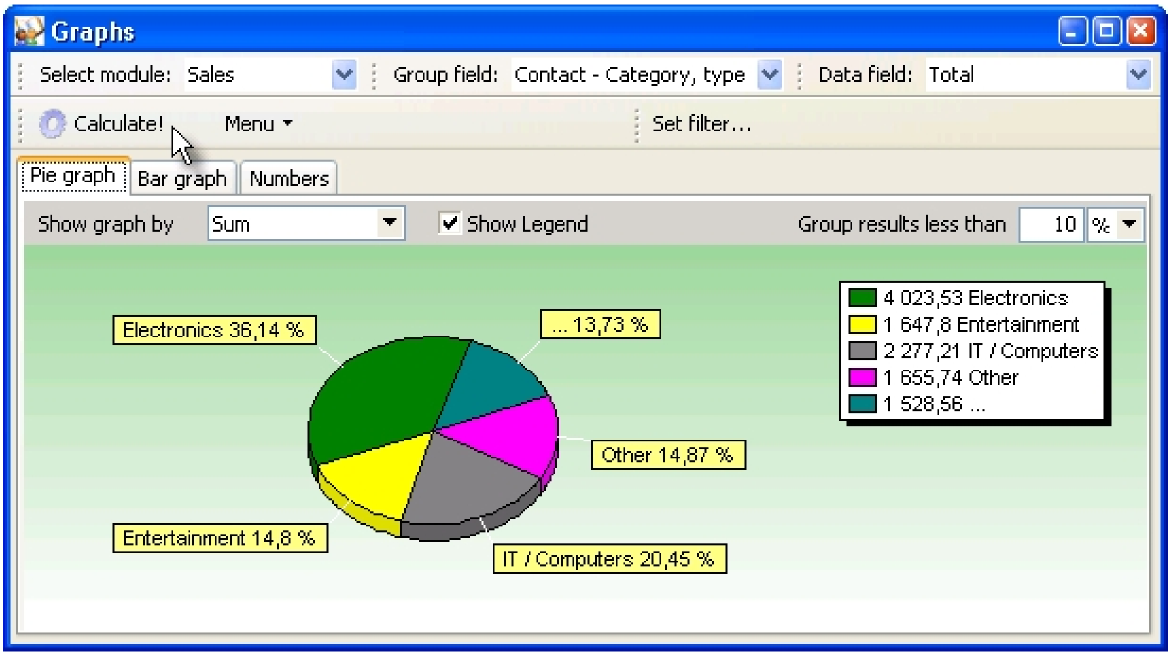
Statistics module is one of the easiest to use modules in the program. Yet it is one of the most important modules. It enables to analyze your data entered, to make better decisions and see in which way you are moving.

From the statistics module you can get any kind of report you need. It is very flexible, supporting data analysis for all modules and all fields. Using filtering makes period analysis possible.

To get statistics, you just have to select the module (data type) you need to analyze, and select the field used to group results. Data field can be selected from numeric fields to get the numeric meaning for those groups.

After you have selected the module and fields click on the "Calculate!" button to find results.

For example on the image below the query (statistics) is requested based on the sales data, to see the total sales value by contact categories:

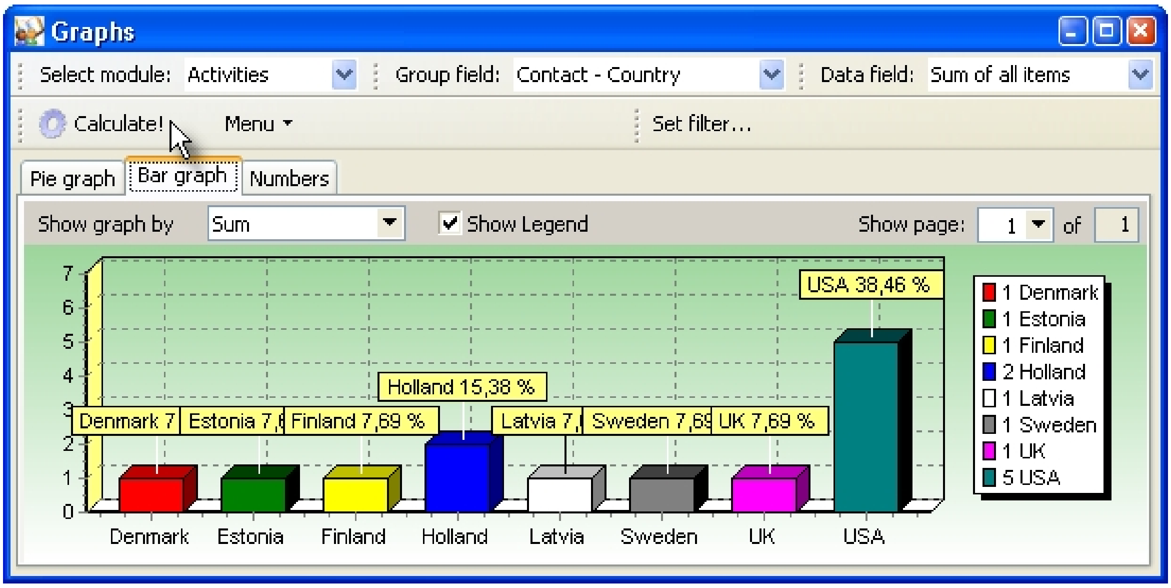


You can additionally select what result you would like to see on the graph ("Show graph by") - Sum, Max, Min, Average, or count.

Also the legend can be turned on or off. If you have too much small and not important values on the result, you can group them into one group. You just have to specify the percentage from which below values are included to the summary group.

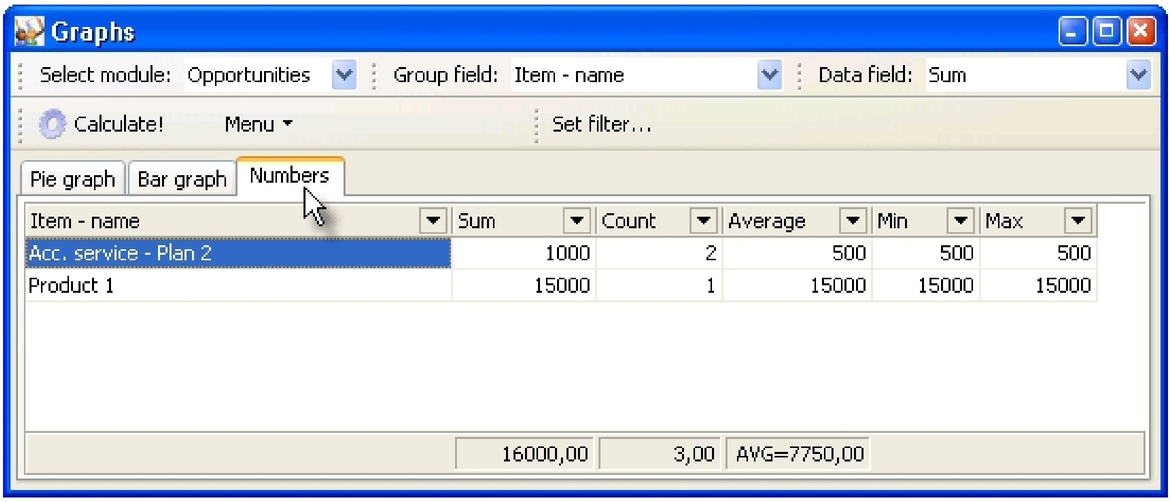
By default your pie graph is moving. This is to eliminate the "statistical lie" theory. This theory says that depending the pie location it appears bigger or smaller as it really is compared to other sectors. If you want to stop the moving, double click on the pie. To start the moving again, double-click on the pie.

It is possible to see your stat results on pie and bar graph or by details by numbers also:



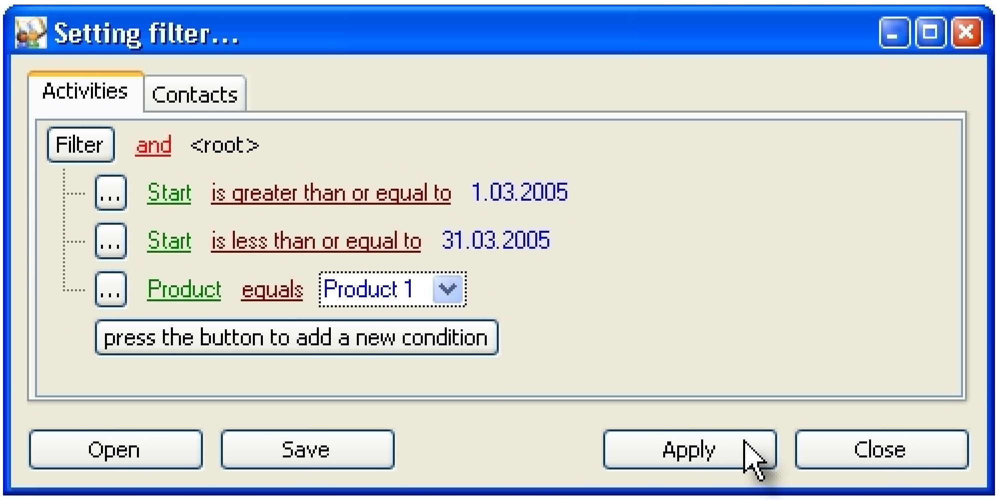
The difference in bar graph is that you can not group smaller values to one group. Instead, to eliminate the effect that you have too many bars on one graph, the result is divided to pages. And you can select which page you would like to see currently on the screen. The number of bars seen per page can be set in program options.

On the "Numbers" panel all the raw data is accessible where you can see all values found based on your query.



The important feature on analyzing your data is filtering. In most cases you need to apply some filter (for example date range) for the data you want to analyze. To do this, click on the "Set filter..." button on the toolbar.

After you have clicked the filtering button filter construction dialog appears:



You can select to which module you would like to apply the filter. You can place filter to all modules related to the query (Activities and Contacts in the above image sample).

Creating filter is similar to the instructions given in the Filtering chapter. To create a new filter condition click on the "press the button to add new condition". After the new condition is added, you can select the field you would like to set limit to. Next you can select the operator (for example "equals"), and as the third component you can enter or select the limiting filter value.

You can have unlimited conditions (for any field available).

Once your filter set is created, you can save it. Saving is useful if the filter is complex. In that case next time you can open (load) the filter condition and just apply the filter quickly without composing it.

After you have applied a filter, the filter dialog appears on top of the module:

If the "Current filter" dialog covers some important number, you can move it on the screen. When you move it on the top of toolbar, it is placed into the toolbar. Still, you can move it away from the toolbar if you would like.

To remove the current filter, click on the button available on the dialog.

Menu button on the statistics module allows you to export your graphs or numeric data, depending which panel is currently active.

3.6 Attachments

Most detail forms have ability to attach files. When you open Menu button at left bottom on the detail form, there is selection "View attachments", which will bring up the attachments related to this record.

Many detail forms have Attachment table already visible in the "Attachments" panel. Also, on the module table you can use quick preview functionality to display related attachments.

Attachment management is easy. When you want to attach some file to the record, click "New" button on the attachments table toolbar. The Attachment Detail form appears where you can enter the date (filled by current date by default), select file and enter your custom comment. To select file on the detail form, click on the yellow button at right on the File edit box. Then you should be able to locate and select the file.

When you attach files, a link is recorder to the original file. The file itself is not copied and remains to original location. So when you make changes to your document, those changes are available also from your CRM system.

It is recommended that you keep all your documents related to your CRM system in one folder, available for all users (if you have multiple users).

In the attachments table you can easily launch selected file. For this use the "Run" button on the toolbar. After clicked, the file is opened with the program it was created and you can make your changes or just take a look.

3.7 Printing, exporting and importing information

3.7.1 Printing lists

You can print all information visible in tables. The program has default print layouts for each table (set in options), but you can change these layouts in the report generator.

To start printing, click on the module Menu button and select "Print", which will bring you a standard printing dialog to select the printer, number of copies, and OK button to start printing.

Similar to printing, you can also preview the information on the screen. For this, select "Preview" from the module menu. The Print Preview dialog appears with report navigation toolbar at top. You can also print from the preview window by clicking the printer icon at left on the preview dialog toolbar.

3.7.2 Printing form detail

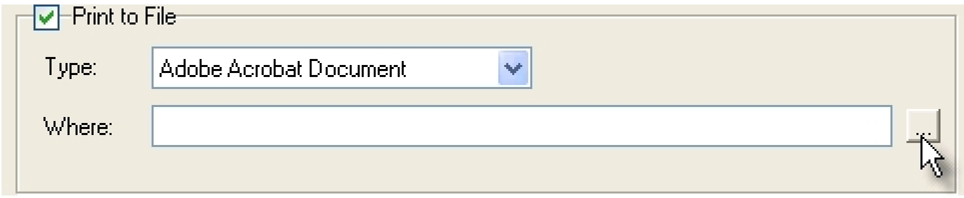
Most forms in TK8 Contact have a printing option available. For this click on the Menu button at left bottom on the screen and select Print or Preview. There is also Redesign option available to change the layout of this printout form.

Print dialog and Preview dialog on form printing are the same as with list printing.

3.7.3 Printing to files

Before the printing starts, you will see the default print dialog. On that window, you are able to print the information to file instead to the printer.

To print your information to the file, please check the option "Print to file" and select the file type. You can select between different file types like text file, Word Document, Excel Document, JPG image, PDF (Adobe Acrobat Document), etc:



After the file type is selected, the next thing is to select where you would like to save that file. For this, click on the "..." button at right on the Where field and select the folder.

After the folder is selected and you are ready to print, just click on the "OK" button and the file will be created.

3.7.4 Exporting data to external file

If you need to use your information outside of TK8 Contact, you can do this by exporting the records you see in the table. Exporting can be useful for example if you want to use some or all the data in some other program also or if you are using PDA and need to carry the information with you.

The content of your exported file is exactly the same as your table you exported. It means that if you are using filters, filtered records are exported only. Also if you are using grouping or sorting the final export file looks the same your table.

For most modules and tables, you can export the content to the following formats:

- MS Excel (XLS files)
- HTML file
- XML file

Graphics (pie and bar graphs) inside the program can be exported to bitmap (.BMP) format.

To start exporting, open the module Menu button and select one of the Exporting options. After selected, you will be asked for a file name for your file. After entered and saved, the export file is created.

3.7.5 Importing data from external file

Import feature is useful when you have some information outside the TK8 Contact but you need to analyze it based on your customer database. For example you could analyze your accounting data like products sold by customer type, status, size, service level, etc. You can import any information. That includes customers, activities, sales, etc. The import module can save the data also to multiple tables at the same time. It means when you are importing sales and the customer (or item) does not exist in your database, it will be added to your database also in addition to the sale record.

You can import any file which is in the "TAB delimited text" format. It is common format and even if your accounting software output or some other file is not in that format, you could try to open it with MS Excel. With Excel you can save the file to TAB delimited text file. Just open your file in Excel, select File menu, Save As, and enter the file name. From the Type selection box select "Text (tab delimited)" and click "Save". Your file should be ready for importing then.

In addition to TAB delimited text file format, it is required that the first line in your file would contain column names. Header name is required for all columns, and it has to be unique. It means you may not give the same name to other columns in your file.

Once you have the file ready for importing, open File menu and select "Table import". Next you can select the file and after you open it, the Import window appears.

In the Import window you can use two panels. One is "View and edit data" where you can check how the file was loaded from the file and if all columns are represented correctly.

On the "Import scheme" panel you can create, save or load the scheme (a template) used to import information from your file.

Creating import schemes

Scheme creation can be complex and time consuming for beginners. But that allows you to import any kind of information to your database. By creating a scheme you are describing to the program what values you need from your import file and where you would like to save them.

> *As the scheme creation is very complex, we are offering scheme creation service free to our customers who have purchased the license. To get the import scheme for your file, please email us a sample file you need to import. You do not have to email the complete file - just the header and some rows inside is enough. Once received, we will create and send you a scheme file which you can open to import your data. Please note that the scheme we create will work for files with the same structure you sent to us. If you change your import file (add or remove columns), you need a new scheme. Though, by opening the scheme file you got from us, you will see how it was described and you are probably able to create similar schemes yourself.*

On the scheme creation table you will be able to use following columns:

- **Fields in the import file**

All fields found in your import file are listed on this column. For each field in your file you will find a record in the scheme description table.

- **Destination field**

Destination field is the field in your database to where you would like to enter the data found in your import file. It indicates from which module and field you are searching that value in the future.

You can select different fields as a destination, from different modules. To select a field, just click on the cell and select the field from the appearing menu.

If the field you are importing can not be edited in the program and can be selected from the selection box, you have to select the module and field from where the values are selected from. For example when you import Activities and you have "Contact Company Name" in your import file, then you can not select "Activities - Contact" as a destination field. That's because the "Contact Company Name" is stored on the Contacts module, on the Company Name field. So you have to select "Contacts - Company" as a destination field in this cell.

When the field you are importing is the base information selection field in the program (with "..." button at right of the field), you need to select "Selection Item - Name" as a destination.

- **Locate**

Check this option if you are importing selection fields. If the option is checked, the program is trying to locate the value found in your import file. The value is searched from the field selected as a destination field. If the value is not found, the record is added to that module and the destination field is filled with the value found in your import file.

- **Put located value to**

You need to fill this cell only for scheme table rows where you have checked the Locate option. Click on the cell and select the field to where the located entry should be selected to.

Based on the "Contact Company Name" sample above, you can now select "Activities - Contact" in this column. So the located contact will be selected to the activities record.

- **Key Field**

If this option is checked, the program will search the value found in your import file. If the value exists in the database (on the field set as a destination field), that record is not added but updated with values found in your import file.

It ensures you will not have duplicate records (for example contacts in cases you already have the contact in the database but your import file has that same contact also listed for importing).

- **Default Value**

If you fill the default value cell, this value will be entered to the destination field for each record added during the import.

- **Skip**

If you do not want to import values for this field, check the skip option.

Scheme examples

Example 1 - Sales:

The following scheme below illustrates how to import sales. As you can see, the Date value found in the row will be entered to the Sales module, Date field. Also the Order Number, Quantity, Price and Total fields.

The contact name found in the import file should be saved to Contact form, Company field. But before the contact is added to your database, the program will try to locate it first. If the contact is found, it will be selected to the sales form. If the company does not exist, the contact is added to your database first and then selected as a contact to the sales form.

Item field description is similar to the Contact field description - at first the program has to check wether this item already exists or not. If it exists, it will be selected to the sales record as the item. If it does not exists, it will be added first and then selected as the item.

Fields in import file:	Destination field:	Locate	Put located value to	Key fi...	Default value	Skip
Date	Sales - Date	☐	<->	☐		☐
Order#	Sales - Order #	☐	<->	☐		☐
Contact	Contact - Company	☑	Sales - Contact	☐		☐
Item	Inventory - Name	☑	Sales - Item	☐		☐
Qty	Sales - Quantity	☐	<->	☐		☐
Price	Sales - Price	☐	<->	☐		☐
Total	Sales - Total	☐	<->	☐		☐

It is possible to import additional customer data also within one scheme. If the file above would contain "Contact phone number" field for example, you could select "Contacts - Phone" as a "Destination Field". In case the program needs to add customer (it was not found), also the phone number field would be filled.

Example 2 - Contacts:

The sample scheme below is created to import table of contacts. Name, Email and Address field destination selections are probably easy to understand.

As you can see the Name is set as a Key field. It means if the record with same value already exists in your database, it will be updated. If the Key field is not checked, the contact is always added despite it exists or not.

Category and Department values found in your import file are base information selection fields in the Contact form. It means the values from your import file should be entered to the "Selection items" database, to the "Name" field. The program should locate them first and add to the database only if they do not exist. After the entry is (added or found) on the database, it will be selected to the contact form.

Fields in import file:	Destination field:	Locate	Put located value to	Key fi...	Default value	Skip
Name	Contact - Company	☐	<->	☑		☐
Email	Contact - Email	☐	<->	☐		☐
Address	Contact - Address 1	☐	<->	☐		☐
Phone	Contact - Phone	☐	<->	☐		☐
Category	Selection item - Name	☑	Contact - Category, t	☐		☐
Department	Selection item - Name	☑	Contact - Department	☐		☐

Saving and loading import schemes

If you are importing data repeatedly from the file with the same structure (same column names and same column count), you have to create the scheme only once. After the scheme is created (and before you start importing), click on the "Save scheme" button to save your descriptions. Next time when you are importing the file with the same structure, click "Open scheme" button and select that file before you start importing. The scheme will be loaded and you are immediately ready to import.

Importing data

Once the scheme is set up, you can start importing by clicking on the "Start import" button. During the import you will see the progress bar and after completed, the Import Window will be closed automatically and you should see the data you imported on appropriate modules.

3.8 Report Generator

In the program, for advanced users there is option to redesign most of the reports. When you use module Menu buttons on the top toolbar you can select "Redesign", which will bring up Report Generator. You can add columns, summary panels, group the report, change font and color, etc.

Report Generator requires very high computer usage skills. Though, it is easy to change some field location, size, and font for example. To change font, just select the field box on the report area and then use top toolbar selections probably already common to you from word processing software like MS Word.

To add some text to your report, please click on the text component - label - at first (A button on the toolbar). After that, click on the report area and move it to the location you like. To change the text, at left on the toolbar there should be a text box available where you can change the text.

If you would like to add field from the database, please use DBText component instead of label (button with table with A on top of it).

If you would like to learn Report generator, please contact us and we can send you detailed manual.

4 Program options

4.1 General

In the general options you can set whether the program will start the database server automatically at program startup or not. Database server is required if some other user needs to access database found in the current computer. If the engine is not running, others can not access databases found in the computer.

You can start the database engine also on Windows startup. In that case you do not need to start

the program first to share the database for others. To start the database engine at Windows startup, drag the engine icon from your start menu programs group, TK8 Contact subgroup to Start menu Programs group, to Startup subgroup.

4.2 Contacts

In the Contacts panel of options you can change settings related to the Contacts module. For example you can set what panels you would like to see on the Contact Detail form.

Also, customer auto numbering can be set, which will number each new customer added to the database.

4.3 Sales

In the Sales panel of options you can change settings related to the Sales module.

You can set if you would like to keep history of changes for sales opportunities or not. If the option is checked, sales opportunities form detail has additional panel where each change on the form is recorded.

Also you can enter and select some settings that would be used as default on creating new invoices.

4.4 Activities

In the Activities panel of options you can change settings related to the Activities module.

Each option listed in the panel has the exact description what it does in the module.

For example you can select wether you would like to track changes on activity form details. In case the option "Keep history of changes" is active, additional panel is seen on the Activities Form detail, where you can see all changes made to the activity.

Also you can change day and period planner settings like the time interval (and the item height (width) - Scale).

On the "Templates" panel you can select files which will be used as templates when you send out emails from the Activities module. By default, TK8 Contact installation has some template samples for activities. These are plain text files you can open and edit with Notepad, or any other text editing tool. The template is just a text you would like to use in the email body. In addition to the text, you can use fields "keys" inside the text. These keys will be replaced with values found in the activity. For example "/---/ On <<START>> our consultant <<ASSIGNEDTO>> will visit your office to /---/". Now, when the email is sent, this text is transformed to something like "/---/ On 12-03-2005 13:50 our consultant Mark will visit your office to /---/"

You can find all the field keys you can use from the file "Activity_Email (available keys for templates).txt", inside the "TK8 Contact\Templates" subfolder like the default demo templates.

4.5 Mail & Phone

Mail settings

To send out e-mails from inside the program, you have to set mail options. The first you have to enter is Host, which is the server (SMTP) name you are using to send out your e-mails. For example it can be something like "mail.yourdomain.com". If you do not know the SMTP server name you are using to send your e-mails from Outlook or Outlook Express for example, just ask it from your service provider.

If your service provider has changed the port to send out e-mails, you can set the new port also here in the options.

The timeout is the time the program is trying to connect even if the server is not reachable (any more).

Phone settings

TK8 Contact is able to start automatic phone dialling from inside the program. For this, you have to specify modem setting in this panel. You need to select your modem Port, and dial command (if required by your modem). After you have set the information specific to your modem, you can start clicking the phone buttons on the program to start phone calls.

4.6 Graphs

On Graphs panel you can set how your graphs will look like in the Statistics module. Here it is possible to select background color, movement of graphs, etc.

4.7 Reports

On the Report panel you can select default report layouts for your modules and module detail forms. These layouts will be used when you print some form or table report.

To select layout, click on the yellow button at right of layout location edit box. After you have clicked the button you just have to select the file. After you save the changed settings, the new layout is used in printing.

4.8 Table colors

You can set different colors for each module table. On the Table Colors panel in options you can select the module panel and change the colors.

To change some color, click on the button at right of color field, after which you can select the color you like on the appearing window.

Also you can set whether you like to see the lines between the rows and columns or not.

4.9 Company info

On the Contact Info panel you can enter information about your company. This information is then used on reports for example.

4.10 Regional settings

On the Regional setting panel, you can select the program language you want to use in TK8 Contact. Also, with language support you can change any field names, menus and messages if required.

Also, you are able to enter the date and time format used in the activities module, on graphical day and period planner.

To change the language file (for example some field name), click on the "Edit language" button. On the appearing window you can open language files for every Module and Detail Form you can see in the program. This helps you to find the form and the word you want to change. After the file is opened, you change the translation in the Translated column. After changed, you can save your work by clicking on the "Save form translations".

In case your local language is not listed in the selection and you prefer to use the program in your local language, you can translate the program yourself. Translating is easy and takes some hours. To create a new language, open TK8 Contact Languages sub folder with Windows Explorer and copy the English folder to the name of your local language. Then return to TK8 Backup and select the new language.

If you translate the program to your local language, please send the files from your new folder to us also, so we could include the translation with next releases.

4.11 Database backups

Backing up your data

From the File menu, Database management window you can make backups from your database.

So you can keep a safe copy of your data in a single file for cases something should happen to your computer. To create a backup, just select the company in the list and click on the Backup button on the toolbar. You have to select the location and the file name for your backup and then will see the progress bar during the backup. Once the backup is ready, the Database Management window is closed.

Restoring database

In case of computer failure, or in other cases you need to restore your backup, select the database to where you would like to restore your data. If you do not have a database yet, you have to create one first. Then, click on the Restore button and select the backup file. During the restoring you will see the progress bar and after completed, the database management window is closed.

Please note: By restoring the backup all your current data in the selected database (to where you restore your backup) will be replaced with the data found in backup. So your current data is deleted and the data from backup is loaded.

5 Ordering and registration

5.1 Why to order

TK8 Contact is shareware. Shareware is try-before-you-buy software. Unlike retail software that you buy in stores, with shareware you can try the software out and see how good it is before you buy it! If you like it, you can order the full version. It's a great way to buy software, plus we offer the 30-day money-back guarantee!

7 Great Reasons to order TK8 Contact:
- Only $89.95 (US)
- 60-day money-back guarantee
- No more trial period limitations and evaluation screens
- Free updates and upgrades for 1 year!
- Unlimited high-priority support free for lifetime
- Serial number emailed to you immediately
- Your customers will be more satisfied and you will make more money

5.2 Price

Prices are subject to change. Latest prices are listed in our homepage http://www.tk8.com.

Licenses do not include a disk with the software. By purchasing a license, you will get a serial number to register your copy (which sets you free of the 30-day trial limitation).

TK8 Contact license prices:

Number of Users	Price per User
1 User	~~$149~~ $89.95

2-4 Users	~~$134~~	$79.95
5-9 Users	~~$119~~	$69.95
10-14 Users	~~$99~~	$59.95
15-24 Users	~~$89~~	$49.95
25+ Users	~~$75~~	$39.95

5.3 How to buy

The fastest and easiest way is to order online, using a credit card. All orders will be processed securely in real time by SWREG (Digital River Ltd). SWREG is one of the most known processing companies in the Internet. To offer you the best and risk-free service, we signed contract with SWREG to process our orders.

In case you do not want to submit your credit card information online, you may use also a check, phone, fax or purchase order. We will accept also direct wire transfers.

All our software includes unconditional **60-day money-back guarantee.** If you aren't happy with your purchase for any reason, just let us know, and you'll receive a prompt, full refund. No questions asked.

To start ordering, please visit our homepage http://www.tk8.com

5.4 Entering License Key

Soon your order is placed, you will receive order confirmation (receipt) together with registration information. By entering and saving this info on the registration window, your copy will be free of the trial period limitations.

The registration information contains License Owner Name and the License Key. To enter them, please click on the "Enter License Key" link on the trial version startup screen, or use Help menu.

On the registration window, please enter the name and the key exactly (case sensitive) as they are typed in the order confirmation e-mail you received. After entered, you can confirm the registration by clicking the "Save" button.

After the info is saved, the copy will be registered. Please restart the program so the registration would take the effect.

6 Getting help and support

Inside the program, when you press F1 on your keyboard, you can read the help file. The help file is also available in our homepage and in the pdf format ready for printing.

If you have any questions or suggestions regarding TK8 Contact, your e-mail is always welcome.

If you have any problems with the program, please include the following information when

contacting us:

- Is the problem (error) reproducible? If so, then how?
- What version of program are you running (to see this, use About in the Help menu)?
- What version of Windows you are running (Windows XP, Windows 98, Windows NT 4.0, etc.)?
- If you see a dialog box with error message on the screen then what is the full text on that dialog box.

Official homepage:
http://www.tk8.com

Support e-mail:
support@tk8.com

Support form online:
http://www.tk8.com/support.asp

General / Sales contact:
info@tk8.com

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marketing@tk8.com

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+372 7 388 000

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Anne 59 - 131
50703 Tartu,
Estonia,
EU.

Business Phone:
+372 50 77 207 (this phone number is for sales and business contact only. To get technical support, please e-mail us or fill the online support form)

7 Uninstalling

Removing TK8 Contact from your system is easy.

Before starting removal close the help file and TK8 Contact program. Make sure also the database engine is not running.

Then open the Control Panel, Add/Remove Programs window. Look for TK8 Contact in the list and select it. Click on the "Add/Remove" button to start removing the application and follow the instructions on the screen.

8 License agreement

TK8 Contact
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